ASSESSMENT OF AN ONGOING UNIVERSITY EXTENSION PROGRAM FOR RETAILERS IN THE DALLAS APPAREL MARKET

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CHAPTER I

INTRODUCTION

Higher Education functions as one of the basic institutions in our culture. The role of colleges and universities in educating young people has been praised as well as criticized by individuals and professional groups. According to Hodgkinson (1979), 12 million students were attending colleges and universities in 1978. Another 46 million adults sought educational programs beyond the traditional academic setting. As many as 5.3 million adults were attending college and university extension classes for educational stimulation and to meet varying needs. Teaching and learning in the non-traditional environment have definite implications for colleges and universities interested in maintaining the traditional student base and, perhaps more importantly, in meeting the needs of a new breed of non-traditional student--the adult learner.

Business and industry have been involved in formal educational programs in their effort to prepare employees and management personnel to assume various levels of responsibility for growth and expansion (Kirkpatrick, 1979). Business leaders understand the benefits of training and equate educational programs to the concept of long-term

investment aimed at reaching company goals and objectives in a more profitable manner. Today in management, researchers are concentrating on personal behavior that might indicate success in business and industry. Research has been limited in regard to management skills and satisfaction associated with specific stages in the business life cycle of a firm (DeCarlo and Lyons, 1980).

Historically, the United States, as a free-enterprise country, has had a long standing kinship with entrepreneurs. The country's philosophy of support for entrepreneurial activities has not abolished business failures. The Small Business Administration, along with other agencies and groups, is committed to aiding small business and to providing financial and management assistance including resource materials for small business owner/managers. According to McQuigg (1980)

> Findings from the Bureau of National Affairs concerning management training and development programs show that, of 75 large companies (1,000 employees or more) and 39 small companies, 75% had in-house training programs, as opposed to 6% who participated in university development programs (p. 324).

Entrepreneurs of small businesses need to seek outside advice since "small firms are less likely to have experts in certain areas on the payroll" (McQuigg, 1980, p. 325). A networking system of conventional advice and direction exchanged through educators could add to the improvement of decision-making procedures for small business owner/managers. Risk-taking is an important ingredient in

decision-making and specific management assistance could increase the probability of success for new businesses. Entrepreneurs should seek and welcome educational assistance.

Extension services in traditional universities can facilitate educational activities for adult learners in the workplace. These educational activities for the non-traditional adult student should work in tandem with goals of educational institutions which provide extension services. Industry leaders engaged in education and training tend to ignore the importance of program assessment and to discount the significance of doing follow-up studies to evaluate the results of educational programs. Brodinsky (1979) indicated that the push toward evaluation of many educational systems that began in the 1970's has had positive results in the educational world. Viable programs that provide educational assistance in the workplace must be assessed and evaluated. Follow-up studies could be used to determine relevant benefits of such programs for adult learners.

Some efforts have been made in recent years to develop programs aimed at providing educational assistance for workers in the workplace which is an appropriate place for learning. One such effort is the Fashion Merchandising Consultant Services (FMCS), developed and administered through the Department of Clothing, Textiles and Merchandising at Oklahoma State University. In August, 1978, the

first FMCS buying and merchandising workshop was presented to assist small apparel retailers attending the Dallas Apparel Market. The workshop was coordinated through Oklahoma State University's Home Economics University Extension and sponsored by American Fashion Association, which is an organization composed of manufacturers' sales representatives exhibiting women's and children's apparel in the Dallas Apparel Market.

A Center for Apparel Marketing and Merchandising (CAMM) was established in the spring of 1982 to continue to provide educational assistance for apparel retailers in the Dallas Apparel Market and other apparel markets across the country. The implementation of the national center gave impetus to a systematic assessment of the impact of Fashion Merchandising Consultant Services which provided educational assistance in the workplace for small retailers through workshops, consultation sessions and seminars for the three-year period, 1979-1981.

Purposes of the Study

The purposes of the study were to assess an ongoing university extension program conducted by Fashion Merchandising Consultant Servises for apparel retailers at the Dallas Apparel Mart, 1979-1981, and to formulate recommendations for improvement and expansion of FMCS educational activities. The three objectives of the study were the following:

1. to assess the impact of FMCS educational activities on apparel retailers.
2. to analyze the strengths and weaknesses in FMCS educational activities.
3. to formulate recommendations to improve and expand FMCS educational activities.

Research Questions

The research questions for the study were the following:

1. What procedures are currently being performed by apparel retailers who attended FMCS workshops related to inventory control, dollar merchandise plan and open-to-buy?
2. What difficulties are apparel retailers who attended FMCS workshops experiencing in performing procedures related to inventory control, dollar merchandise plan and open-to-buy?
3. What type of impact has Fashion Merchandising Consultant Services had on retailers attending FMCS workshops, consultation sessions and seminars?
4. What modifications might be made to improve and expand FMCS workshops?
5. What are some of the future educational needs of small apparel retailers?

Assumptions

The assessment of the Fashion Merchandising Consultant Services was based on the following assumptions:

1. Assessment of educational activities, whether in the traditional classroom or in the workplace, should be an integral part of a total educational program.
2. Small apparel retailers need specialized assistance to improve merchandise management skills and increase economic gains.
3. The survival of America's free enterprise system depends on the success of small businesses.
4. Failures in small businesses affect the nation's economic growth and successes of small businesses enhance the social environment.

Definition of Terms

Throughout the study, the following definitions were used.

1. American Fashion Association--Organization composed of wholesale sales representatives exhibiting women's and children's apparel and kindred merchandise at seasonal markets in the Dallas Apparel Mart.
2. Assessment Survey--An opinionnaire developed by the researcher to identify procedures performed, difficulties encountered, and influences of FMCS

as perceived by retailers attending one or more of the FMCS educational activities 1979-1981.

3. Buying and Merchandising--Activities involved in the planning, procuring and controlling of merchandise for retail stores.
4. Dallas Apparel Market--A regional market center where wholesale sales representatives exhibit seasonal apparel and kindred merchandise and where retailers place orders for future delivery and resale to the ultimate consumers in their local community.
5. Educational Assistance--Information, procedures and techniques used by educators to assist small apparel retailers in improvement of their management skills.
6. Fashion Merchandising Consultant Services (FMCS)--Organization of specialists in education and business who work together to provide educational assistance in the workplace for apparel retailers through workshops, consultation sessions and seminars.
7. FMCS Consultation Sessions--Fifteen to twenty minute one-on-one conferences held by FMCS educators at the Dallas Apparel Market during five seasonal market periods to give educational assistance to small apparel retailers.
8. FMCS Seminars--One-hour sessions held at the Dallas

Apparel Market by FMCS educators during the five seasonal market periods to give educational assistance to small apparel retailers.

9. FMCS Workshops--All-day sessions held in the Dallas Apparel Market by FMCS educators for small apparel retailers to learn basic skills related to buying and merchandising functions.
10. Follow-up Survey--Questionnaire developed by FMCS and sent to participants four months after attendance at workshops to ascertain changes implemented in buying and merchandising procedures.
11. Long Contacts--Retailers who interacted with FMCS educators through day-long FMCS workshops held at the Dallas Apparel Market.
12. Performance Objective--An explicit statement of what the FMCS workshop participant will be able to do upon completion of each section in the learning workbook.
13. Reaction Evaluation--Evaluation of the immediate reactions of participants to content and format of the day-long workshops.
14. Retail Apparel Guides--A group of experienced apparel retailers associated with FMCS in development and presentation of educational learning materials for the workshops held at the Dallas Apparel Mart.
15. Short Contacts--Retailers who interacted with FMCS

educators through fifteen to twenty minute consultation sessions and/or one-hour seminars held at the Dallas Apparel Mart.

16. Terminal Objectives--An explicit statement of what the FMCS workshop participants will be able to do upon completion of each section in the learning workbook.

CHAPTER II

REVIEW OF LITERATURE

Small businesses cannot be viewed as miniature versions of large business enterprises. Information on profitable ways to manage a small business is often based on theories and strategies developed and utilized successfully by owner/managers of large businesses. Lowry (1981) indicated that small business entrepreneurs, because of restricted financial resources and limited specialists, need to cultivate management concepts and strategies. McQuigg (1980) recognized the need for the small business owner/manager to seek outside advice on management concerns because of the limited range of expertise within the enterprise. For many small retailers involved in business transactions, the availability and utilization of educational assistance could bring long-term benefits.

Professional consultant services could develop programs to answer some of the problems facing new small business retailers (Franklin and Goodwin, 1983). An important part of any structured program is the evaluation/assessment phase (Wentling, 1980). Building the assessment phase into the overall educational program may assure the consultants and participants of a worthwhile experience. The literature

related to this study was organized into the following sections: small business entrepreneurship, apparel retailing, educational assistance for entrepreneurs, program assessment, adult learner and other related research.

Small Business Entrepreneurship

Informational advice for small business entrepreneurs is available through organizations such as the Small Business Administration, Dun and Bradstreet, and Bank of America. The need of small business entrepreneurs to ask for help is well documented and well known. Many small business owners seek professional assistance from the Small Business Administration which is "the largest small business assistance agency in the U. S." (Franklin and Goodwin, 1983, p. 5).

A traditional characteristic of the entrepreneur is that of risk-taking. Weintraub (1979, p. 9) defined an entrepreneur as "a creative risk-taker, an innovator who deals with change." Since the United States economy was founded on free enterprise, one might assume the twentieth century would have produced a myriad of small business experts. Today the opposite seems to reflect the state of current affairs in the business sector.

In Apparel Outlook, Dun and Bradstreet (1982) reported that

> Retail casualties rose 40 percent in 1981, not as steeply as in the preceding year when they climbed 54 percent. At 6,882, the toll among retailers was the heaviest in any year since 1962 (p. 4).

DeBoer (1974) in Marketing Research Procedures, a Small Business Administration publication, indicated that

> One of the greatest needs of managers of small businesses is to have adequate, accurate, and current information on which to base their decisions concerning the marketing of their product or services (p. 2).

In today's economy, the success of the small business entrepreneur is based less on hard work and long hours and more on the ability to make decisions based on a current and accurate picture of the market place. "Small retailers can seek and get a larger proportion of the discretionary dollars of their customers by realizing their novel position in the apparel retailing field" (Bank, 1968, p. 1). The attributes of small business entrepreneurs include the following: the small retailer knows his or her customers, is more sensitive to the changing wants of the customer, is able to be more flexible in adjusting marketing directions to meet the changing customer needs.

Recently, colleges and universities have had noticeable increases in students wanting to major in small business (How, 1979). The growing interest began to appear in the 1970's with the popularity of the concept of do-your-own-thing. A major indicator of the continued interest in entrepreneurship was cited in a Business Week article

> Some schools have offered such courses for years. Harvard Business School was in the vanguard of the entrepreneurial trend when in 1947 it offered a new course centering on "the opportunities, risks, and management problems involved in establishing and operating new enterprises," as the course catalog described it. But according to Karl H. Vesper, professor at the University of

> Washington who is generally acknowledged as the dean of entrepreneurial studies, only seven other schools had joined Harvard in offering entrepreneurial courses by 1968. However, just a decade later that number had jumped to 137, with enrollments encompassing more that 4,000 students per year. What is more, Vesper says the 1979-1980 school year should see 215 such courses offered by colleges (p. 86).

Today, degree-bound students enrolled in colleges and universities have many opportunities to prepare themselves for the world of small business. The United States Office of Education research project at Oklahoma State University directed by Greenwood in 1978 included learning packages designed to assist potential apparel store entrepreneurs to learn the management and buying functions (Greenwood, Callsen and Mott, 1978). Entrepreneurs who are in the small business area frequently need some type of educational assistance because their problems are unique and different from concerns of the larger businesses. Qualified educators have an opportunity to aid small business owner/managers in achieving a greater return on investments.

Apparel Retailing

Retailing has been accurately described as a complex and competitive business in which successes do not always outweigh failures. In apparel retailing, the significance of the small retailer is often negated because of the wide visibility of the volume retailer. Yet approximately 85 percent of retail stores classified by type of operation are single-unit independent stores (Pfeiffer, 1979). These

independent stores account for approximately 55 percent of all retail sales.

The number of apparel retail casualties for 1981 as reported in Dun and Bradstreet' Apparel Outlook (1982) was 783 (11 percent of all retail casualities) with liabilities over $117 million; this was the largest number of apparel retail failures since 1963. There were increases in casualties among children's and infants' wear shops; 30 in 1980 to 59 in 1981. There was a slight increase in casualties among women's and misses' ready-to-wear; 238 in 1980 to 275 in 1981.

The major underlying causes of retail apparel business failures in the United States in 1981 according to Dun and Bradstreet were quite similar to the causes listed for retail failures in 1979: incompetence, 37.5 percent for 1981 and 39.3 percent for 1979; lack of experience in the line, 22.5 percent for 1981 and 19.5 percent for 1979; unbalanced experience, 19.7 percent in 1981 and 16.0 percent in 1979; lack of managerial experience, 12.3 percent for 1981 and 17.1 percent in 1979. At least two things can be said for underlying causes of business failures--they are constant and consistent.

The "umbrella" reason that so many businesses fail is the lack of management skills of owners. Ninety-two percent of the underlying causes for apparel retail failures in the United States during 1981 were associated with several variables related to the generic problems of lack of exper-

ience and incompetence. The major apparent causes of apparel retail failures in 1981 as reported by Dun and Bradstreet were inadequate sales (62.7 percent), inventory difficulties (23.8 percent), heavy operating expenses (18.1 percent) and competitive weakness (17.5 percent).

The Small Business Reporter, published by Bank of America, indicated that the American public will spend more than 70 billion dollars annually in the pursuit of buying and selection of dress. With the large amount of money invested annually in dress, it would seem that most apparel businesses might have a good chance to break even and show a profit. But factors such as "changing lifestyles, capricious customers and intense competition make apparel retailing a risky endeavor" (1978, p. 1).

Dickinson (1981, p. 373), like many other retail authorities, indicated that "fashion merchandisers tend to have more factors to worry about than merchandisers in other areas." Packard, Winters and Axelrod (1976) wrote that there are five unique aspects to apparel fashion merchandising: 1) obsolescense factor, 2) higher markdowns, 3) faster turnover, 4) seasonality of merchandise and 5) predicting consumer likes and dislikes. Dickinson, aware of the unique characteristics related to apparel retailing, indicated the relationship between merchandising of apparel and non-apparel items.

> Despite the various differences between fashion and other types of goods, the same basic retail problems have to be addressed. Fashion merchandisers must still create assortments, price

> merchandise, negotiate with suppliers, feel constrained by open-to-buy restrictions, and indeed, do most of the things that other merchandisers do (p. 374).

"Profitable operation of an apparel shop is a complex and arduous task demanding business acumen and a strong retailing background" (Bank, 1978, p. 2). Justis and Jackson (1980) in American Journal of Small Business included three ways for growth and success germane to the small business entrepreneur: 1) increase market share, 2) increase customer frequency, 3) increase price. The authors stated that "for an individual small business, the most controllable factor is increasing the frequency of current customers" (p. 49). In a recent article in Forbes Magazine, Curtis (1981, p. 200) made the following statement: "The garment industry is less of an adventure and more of a business." The quotation could be paraphrased to infer that apparel retailing today is less of an adventure and more of a business.

Educational Assistance for Entrepreneurs

Today businesses, large and small, invest time and money in education and training programs in order to better prepare their employees and management people to meet the demands of their job or position. It is estimated that approximately 750,000 individuals in 1980 participated in business and professional conferences held throughout the United States. The popularity of educational assistance can be realized by the $350 million cost of such programs

in 1980--a big increase from only $92 million in 1970 (Back, 1981). Education and training programs help companies to reach and go beyond their goals by diffusing information on strategies, tactics, competition, and customer concerns. Springborn (1977) reported

> No longer can we merely hire skilled help or depend upon people to develop themselves. Rather, people must be trained by experts on the job, so that they develop new skills, upgrade existing skills, and keep ahead of the numerous changes that are a part of our advancing scientific knowledge (p. 20).

There seems to be a strong awareness in business and industry that educational assistance in the workplace is thought of as an investment. According to Schwaller (1980)

> The literature suggests that education is generally applied to the development of information, concepts and intellectual abilities, whereas training suggests skills acquisition through repetition in performance (p. 322).

Franklin and Goodwin (1983) reported in the Journal of Small Business Management that the major sources of assistance that small business owner/managers viewed significant were "characterized as informal sources in that they are easily accessible sources that owner/managers interact with fairly routinely" (p. 10). The four top sources of information were other business people, accountants, suppliers, and trade associations. College courses were ranked 14th, Small Business Administration was ranked 16th, and college professors were ranked 23rd. Franklin and Goodwin further suggested possible reasons why small business owners seek assistance from informal sources.

> However, non-routine effort must be exerted to attend a conference, take a college course in marketing or financial analysis, or to contact the Chamber of Commerce to ask for information that will be helpful in developing a marketing strategy or solving a particular problem. The survey results suggest that small business owners tend to use and consider most important those sources that are convenient and require minimal aggressive effort to employ (p. 11).

Franklin and Goodwin implied that the small business owner/manager needs to obtain educational assistance from formal sources such as universities, colleges, or the Small Business Administration.

Solomon and Carhart (1982, p. 50) reported in the American Journal of Small Business that "most small business people have a difficult time in obtaining or learning new techniques for improving the viability of their specific business." Though most enter the world of retail entrepreneurship with a dedicated zeal and positive perspective, neophytes comprise a large percentage of retail casualties; Dun and Bradstreet (1979) reported that 62 percent of retail businesses five years old or less failed.

> Without a major effort to provide needed training and education, many small businesses will continue to "grope through the darkness" of ignorance in an attempt to survive and compete in today's demanding marketplace. If these individuals were aware of the common causes of business failures and how to avoid them, the massive psychological, social, and financial waste could be avoided. In the aggregate, a nation loses jobs, taxes, productivity, and economic growth--all for the lack of small business training (Solomon and Carhart, 1982, p. 51).

Tuhy (1982) emphasized the need for formal education and training.

> The orthodox wisdom until recently was that the only school for entrepreneurs was the school of hard knocks. Entrepreneurs were considered mavericks, out of place in a classroom as in a traditional job. But to survive in today's economy, small businesses, like big, require management skills--skills often best acquired through formal training (p. 235).

Educational assistance from junior college and university professionals has been steadily increasing to go along with demand from entrepreneurs. Since 1982, the Small Business National Training Network, created by the United States Small Business Administration and the American Association of Community and Junior Colleges, has delivered low-cost, client-directed training (Solomon and Carhart, 1982). The concepts presented related practical and basic areas such as planning, marketing, recordkeeping.

Many colleges and universities have had a long-time association with helping adults reach a higher level of business competency. For the adult learner this might entail learning new concepts one day and applying them the next day (Thoryn, 1982). With an increase in educational assistance for the entrepreneur, retailers should succeed more often than in the past where formal help of an unbiased nature was more limited.

An effort to offer more specific educational assistance for small apparel retailers was initiated by educators at Oklahoma State University. A research project undertaken by four graduate students in the Clothing, Textiles and Merchandising Department at Oklahoma State University was entitled "Instructional Materials for Adult Entrepreneurship

of Apparel Shops." The funding agency was the United States Office of Education. The director of the project was Dr. Kathryn M. Greenwood, with Dr. Margaret Callsen and Dr. Dennis Mott acting as co-directors. The researchers developed and evaluated individualized instructional materials dealing with entrepreneurial competencies for potential small apparel store owner/managers (Diggs, 1978).

Program Assessment

According to Sjogren (1979), evaluation and research activities, although similar in purpose, possess a major differentiation.

> Research has the purpose of identifying generalizable knowledge while evaluation has the purpose of determining the worth of something... The distinction between evaluation and research is useful in planning for impact assessment in that the evaluation approach is less restrictive in terms of methods that yield acceptable and useful information. The fact that evaluation is a form of "disciplined inquiry" does indicate that the basic designs used in evaluation work are similar to the designs used in research (pp. 110-111).

Evaluation, both formal and informal, has long been an important companion to formalized education. Impact or outcome evaluation of a program or course are more infrequent (Knox, 1979).

Sjogren (1979, p. 109), in discussing continuing education, defined impact as "outcomes or effects of a continuing education activity that are assessed beyond the instructional program." For example, the use of knowledge or skill learned by students in a particular course could

be evidence of impact; for more detailed programs consisting of many types of learnings over a lengthy period of time, "outcomes may be assessed as a cumulative impact on work or life style."

In the sourcebook, Assessing the Impact of Continuing Education (Knox, 1979), the growing interest in evaluation of educational programs was noteworthily addressed; impact evaluations of educational programs designed by the military, medical, Cooperative Extension Service and university educators were discussed. Traditionally, the Cooperative Extension Service has been in the vanguard with their lengthy association with impact evaluation. Other educational institutions have reacted to impact studies with both interest and action. The accountability outcry of the 1970's gave impetus to a more concentrated effort to evaluate outcomes of continuing educational programs.

In light of the current, far-reaching concept of accountability, impact research is a viable endeavor. Business, industry and government have a long history of attempting to improve management procedures through various types of programs, workshops and seminars. According to Parry and Robinson (1979), developers of educational programs seem to have great difficulty in assessing the impact of such endeavor. The evaluation forms filled out by participants at the close of a program do not tend to reveal future benefits to the program developer. The

reaction evaluation does indicate the immediate responses of the participants to the specific program.

Consultants need concrete information as a basis for program changes and adjustments. Parry and Robinson (1979, p. 13) concur with the philosophy that "effective managers are made, not born." The goal of program developers, whether the offerings are by private companies, public agencies or educational institutions, should focus on the desired impact and change. Various authors suggested ways to assess needs of business organizations such as the Needs Inventory, Critical Incident and Climate Survey (Parry and Robinson, 1979). The Needs Inventory instrument helps program coordinators to identify skills and abilities deemed essential for managers who will participate in training seminars. The Critical Incident survey helps program developers to learn about problems recently faced by managers and other employees. The Climate Survey helps to measure participants' attitudes in relation to the climate of the organization or company. Strengths and weaknesses of the firm can be identified through program content.

To help program developers determine objectives for educational programs, Parry and Robinson identified 10 possible objectives for management development seminars. Three of the 10 items related specifically to planning educational assistance in the workplace for apparel retail owner/managers: 1) increase knowledge and skill in handling

managerial responsibilities; 2) provide a setting for exchange of experience and discussion of concerns; 3) discuss current problems and opportunities facing the organization.

Three separate, significant steps in the development of viable programs in continuing education were described by Boone, Fox, and Joseph (1979, p. 49), namely planning, implementation and evaluation. "Although evaluation has always been viewed as an integral process of programming, it has received the least emphasis." Follow-up studies seem to be an area that have not received appropriate attention from educational programmers. Wentling and Lawson (1975), in Evaluating Occupational Education and Training Programs, addressed the notable role of follow-up studies in educational program evaluation. Program developers need to understand evaluation concepts and skills in order to obtain beneficial evaluative information from participants. One reason the evaluation step has not received attention is that program developers have few models for effective evaluation of on-going programs for adults.

A major strength of an assessment survey is the direct input from participants. Kinsey (1981) indicated that little had been achieved in the area of adult participatory evaluation. This term can easily be defined as adult participation in evaluation of non-formal education. Kinsey stated:

> Although those in adult and non-formal education programs are mature individuals with significant life experience and potential insight, their participation in evaluation is typically limited to

> passive roles as informants or sources of information (p. 155).

Educators need to look more closely into the benefits of seeking feedback from adult participants involved in non-formal education. There is a definite need for planners of educational assistance to recognize that adults can gain more insight and knowledge through the implementation of evaluation/assessment components. Knowles (1976, p. 60) indicated that the "process of evaluation clearly has pedagogical potential, and greater participation can augment learning through evaluation."

Kinsey (1981) suggested several objectives to consider in the implementation of participatory evaluation as part of program planning.

> 1) To increase the accuracy and utility of data
> ...by weighing or interpreting data according to different perspectives, identifying issues of concern to a greater number of participants
> 2) To be more open to the unanticipated
> ...by suggesting new categories of questions, influences, results
> 3) To promote learning
> ...of clientele or staff through self-evaluation,
> of groups through program evaluation,
> of individuals,
> of how to evaluate
> 4) To improve awareness and communication
> ...among staff and/or clientele promoting understanding of program or reducing conflict
> 5) To increase motivation and commitment
> ...to learning, to role performance, to program; and
> 6) To develop outside understanding and support of programs
> ...among citizens, institutional administrators, funders (p. 159).

Adult Learners

In The Inquiring Mind, Houle (1961, p. 1) recognized that the twentieth century learners did not originate the concept of lifelong learning because "the continuing learner has existed in every age." Verner and Booth (1964, p. 3) stated that "the education of adults has constituted an integral part of all cultures at all times in history." Early civilizations bred an impressive array of adults who embraced the art of lifelong learning in various ways in order to meet and go beyond personal goals. Plato, Socrates, Aristotle were well-known patrons of continual learning. Some cultures, such as ancient Greece and Renaissance Europe, were founded on the concept of continual learning (Houle, 1961). Many individual and societal benefits were attained because of lifelong commitments of some people for knowledge and scientific learning.

In the early years of the 1900's, Alfred North Whitehead, English philosopher of science, advocated expanding the definition of education to include "continual inquiry." In past cultures, rapid change was not so blatantly obvious as in contemporary society. The lifestyles, values and goals of one culture were passed on to the next generation with little modification. The individuals of these change-less cultures thought of education simply as the spreading of the known. In contrast to the people living in earlier societies, individuals living in the United States since the Second World War have had to make many adjustments to

major changes in society (Knowles, 1975).

At the December, 1965 meeting of UNESCO International Committee for the Advancement of Adult Education, Sir George Pickering echoed a concern for everyone to understand the influence of rapid change in our contemporary culture. According to Pickering (1969, p. 6) "it is one of the basic platitudes that the most outstanding and most truly novel feature of the world in which we live is its rate of change." Cross (1981) indicated that because of rapid changes taking place today, children must learn tasks and develop knowledge about new subjects unknown in their parents' childhood. Tough (1979, p. 42) also recognized the importance of continual learning in societies where changes were minimal. He stated that "deliberate learning would be important even if there were no changes in the world surrounding the individual." Change in an individual's lifestyle, job, interests and responsibilities would necessitate adjustments and new learnings, but external factors such as social, political, economic and technological changes in an individual's lifetime would demand even more concentrated effort for an individual to learn to cope.

In the United States, it appears that many individuals seek and enjoy change for the sake of change. Toffler's (1970) widely read book Future Shock was concerned with the postwar evolutionary concept of change and the need to learn coping skills. For many individuals, change is a

search for new ways to live the good life and improve the quality of life. Other individuals view change from the negative side and give little attention to analyzing the benefits and challenges of change.

Presently, adults have embraced the concept that continuing education is a value to be nurtured. Educators no longer think that learning takes place in the strictest sense only in the traditional classroom setting (Carp, Peterson, and Roelfs, 1974). The adult learner has become a viable and visible individual who seeks information and new experiences on various subjects throughout a lifetime. "The need for a more educated adult population in the marketplace emphasizes the increased need for lifelong learning" (Hunt, 1979, p. 7).

Blakely (1972) indicated that the number of adults involved in continuing education has been swelling yearly. In 1970, adults engaged in planned educational programs outside the college and university milieu numbered 60.3 million. This number takes on additional meaning when compared to the number of students enrolled in formal educational programs. During the same year, 1970, students enrolled in kindergarten through graduate school and including professional schools numbered less than 60 million.

The Commission on Non-Traditional Study collected data in 1974 on the adult learner. The findings were used to formulate recommendations for future direction in the area of non-traditional students. The results revealed a very

positive picture of the emergence of large-scale interest in continuing education for adults. According to the findings of the study, 80 million American adults not enrolled as full-time students wanted more knowledge in certain areas of interest. Approximately 32 million adults were engaged in some form of learning at the time of the study, in 1974. A large number, 43 percent, of the potential learners indicated an interest in vocational subjects. "Three fourths of them prefer to learn in group settings such as classes, discussion groups, conferences, workshops, group action projects and on the job" (Carp et al., 1974, p. 51).

According to Tough (1975), adults in the role of learners indicated an immediate need to amass significant information on a wide variety of subjects from the simple to the difficult and from keeping up-to-date on familiar subjects to learning about new areas.

> Job-related learning projects will probably continue to be important after the person enters the occupation or obtains a new job. At times, he may maintain or up-grade his competence by gaining general background knowledge or learning new skills. Also as new knowledge is discarded in his field and as procedures change, he will have to learn in order to keep up. (p. 35)

Johnstone and Rivera's (1965) national survey, Volunteers for Learning: A Study of the Educational Pursuits of American Adults, indicated the main concern in adult learning is one of useful learning.

> The main emphasis in adult learning is on the practical rather than the academic; on the applied rather than the theoretical; and on skills rather than on knowledge or information (p. 3).

Adults urge educators to offer educational programs that will address their immediate needs and offer new challenges that are a by-product of living in a world in which rapid change is omnipresent.

> Adults engage in learning in response to pressure they feel from current life problems; their time perspective is one of immediate application. They regard learning as a process of improving their ability to deal with problems they face now. They tend to enter any educational activity in a problem-centered frame of mind (Knowles, 1967, p. 278).

The concept of "teachable moments" has direct implications for educators who want to meet the needs of a variety of adult learners in a more effective way. Havighurst and Orr (1975) defined teachable moment as a receptive time for individuals to seek information because of a pressing and immediate need to learn. The philosophy of lifelong learning should indicate that many of the long-standing views on education are being displaced by a more open and holistic approach. There are many salient concerns for educators and educational institutions as they prepare for and address the needs of this new breed of adult learner.

Writing for the Harvard Business Review, Dill, Crowston, and Elton (1965, p. 122) equated the important societal changes with frustrations in keeping competent in professional endeavors. "As the environment changes, so does the need for knowledge and skills that managers can use to cope with it." The authors indicated that because professional achievement has become a norm for many contem-

porary men and women, the need and desire to continue learning has become tantamount to success and financial gain.

Related Research

Cremer (1977) and LeMay (1977) developed and evaluated learning packets for use by potential small retail entrepreneurs. Cremer studied the buying and merchandising function and LeMay investigated the advertising and promotion function necessary in managing a small apparel retail store. LeGrand (1978) studied selected stores to determine the relationship between problem areas and the business life cycle, size and type of store. The problems were classified into one of four retailing functions: accounting and control, buying and merchandising, advertising and promotion, and operations and management. Strickland (1979) developed and evaluated learning guides related to merchandise plans for the small apparel entrepreneur. The learning guides included information on dollar merchandise plans and open-to-buy plans. Evaluation of the learning guides was held during a pilot-study workshop for small apparel retailers in the Dallas Apparel Market, 1979. Kendrick (1980) developed and evaluated learning guides for use by the small apparel retailer in the area of inventory control. These guides were evaluated during a workshop held in the Dallas Apparel Mart, 1979. Swan (1981) investigated small apparel store efficiency through a case study technique. Financial,

problematic and ownership satisfaction factors were studied in order to design a model that could be used to evaluate the efficiency of small apparel store merchants.

Summary

In summary, apparel retailing for the small entrepreneur involves much risk-taking. Dun and Bradstreet (1982) reported that the number of apparel retail failures in 1981 was the largest number since 1963. The major underlying causes for such casualities were associated with several variables related to the generic problems of lack of experience and incompetence. Dickinson (1981, p. 373) indicated that apparel retailers tended "to have more factors to worry about than merchandisers in other areas."

Franklin and Goodwin (1983) and Tuhy (1982) reported that small business entepreneurs are in need of educational assistance from formal sources such as colleges, universities or the Small Business Administration. According to Thoryn (1982), educational activities such as workshops, seminars, conferences could help the small business entrepreneur to learn new concepts one day and apply them the next day.

In any formalized educational endeavor, educators have a better idea of the worth of a program when outcome evaulation is planned as an integral part of the entire educational activity. Knox (1979) reported that impact or outcome evaluation of an educational program or course is

more infrequent since most evaluation relates to the immediate reaction of the program participants. In light of the current, far-reaching concept of accountability, impact research is a signigicant endeavor.

Bonne, Fox, and Joseph (1979) indicated that of the three parts of any viable educational program, namely, planning, implementation, and evaluation, evaluation receives the least amount of attention. Parry and Robinson (1979) indicated that educators have difficulty in assessing the impact of various educational programs and courses. Since many adults today are participating in non-traditional programs and courses, according to Knowles (1980) and Cross (1981), that answer current needs and interests, educators need to emphasize assessment of the impact of such educational activities.

CHAPTER III

METHOD AND PROCEDURE

The purposes of this study were to assess an ongoing university extension program conducted by Fashion Merchandising Consultant Services (FMCS), for apparel retailers at the Dallas Apparel Mart, 1979-1981, and to formulate recommendations for improvement and expansion of FMCS educational activities. The three objectives of the study were the following: 1) to assess the impact of FMCS educational activities on apparel retailers; 2) to analyze the strengths and weaknesses in FMCS educational activities; 3) to formulate recommendations to improve and expand FMCS educational activities.

To achieve these three objectives, the procedures for this study were developed in four stages: Stage I, Development of the Assessment Survey; Stage II, Assessment of Impact; Stage III, Analysis of the Strengths and Weaknesses; and Stage IV, Formulation of Recommendations. Figure 1 depicts the steps related to Stages I, II, III, and IV. The following discussion explains the detailed procedures for each of the four stages.

STAGE I Development of Assessment Survey	STAGE II Assessment of Impact	STAGE III Analysis of the Strengths and Weaknesses	STAGE IV Formulation of Recommendations
1 Compile and Analyze Previously Collected Data on Participants -Demographic Data -Evaluative Data Reaction Evaluations Follow-up Surveys 2 Design Instrument -Sample Selection -Survey Content/ Format 3 Pretest Survey -Reliability -Validity -Final Revisions 4 Collect and Compile Data -Follow-up Activities -Analysis of Data -Frequency Distributions -Chi-Square	1 Develop Profiles -Number of Respondents -Characteristics of Stores ard Retailers 2 Compile Reactions to Six Procedural Concepts -Perpetual Inventory Control -Physical Inventory Control -Manufacturers' Performance -Dollar Merchandise Plan -Open-to-Buy Plan -Market Open-to-Buy 3 Compile Reactions to FMCS -Influence on Procedures -Professional Help -Attitudinal Changes -Use of Procedures -Future Needs	1 Ascertain Strengths and Weaknesses -Procedures Performed -Difficulties Encountered -Influence on Retailers -Comments from Retailers 2 Identify Relationships -Length of Contact -Age of Stores -Annual Sales Volume -Pairs of Statements	1 Formulate suggestions Based on Findings -Six Procedural Concepts -Five General Concepts 2 Formulate Suggestions Based on the Concept of Andragogy 3 Propose Recommendations -Improvements in FMCS -Expansions of FMCS

Figure 1. Procedural Stages Related to the Assessment of FMCS Educational Activities 1979-1981

Stage I: Development of Assessment Survey

Stage I of the assessment study was to develop the Assessment Survey. Stage I included the following steps: 1) compile and analyze previously collected data on participants of FMCS educational activities, 1979-1981; 2) design instrument; 3) pretest Assessment Survey; 4) collect and compile data from Assessment Survey.

Step 1: Compile and Analyze Data

Data were collected on retailers attending 11 FMCS continuing educational activities at the Dallas Apparel Mart, 1979-1981. These activities consisted of three day-long workshops, six one-on-one consultation sessions held during three-day market and two hour-long seminars. These activities were developed for apparel retailers in business less than five years and with an annual sales volume under $500,000. Data related to FMCS educational activities were classified into two types: demographic data and evaluative data.

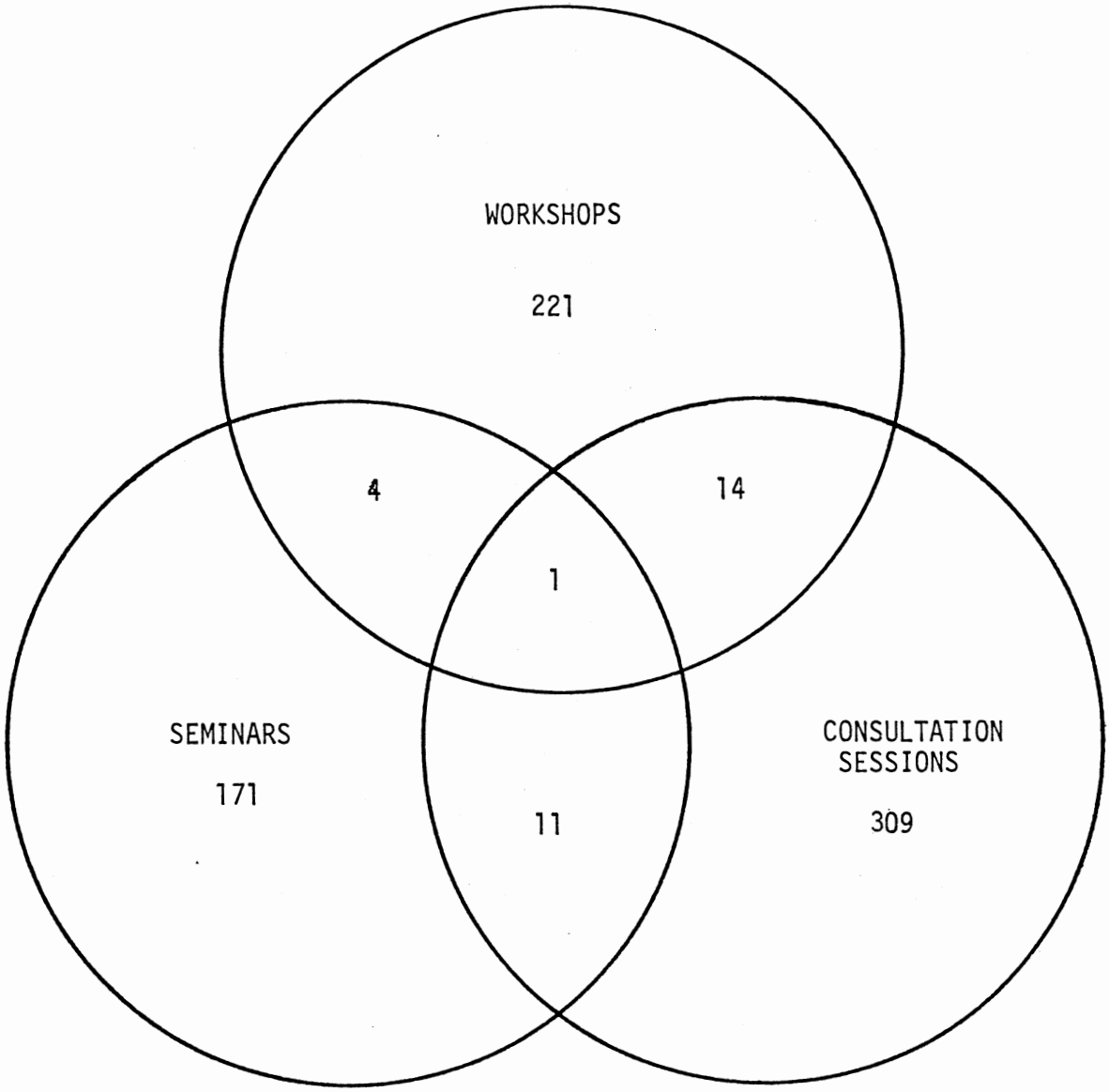
Demographic Data. Names and addresses of participants of FMCS educational activities were organized according to type of educational activity such as workshop, consultation session or seminar. These lists included names of 570 retail stores and 762 retailers. Data, such as location, age and annual sales volume of stores used to develop profile of participants (stores) attending workshops and

profile of participants attending consultation sessions and seminars, are presented in Appendix A. Information on the total number of individual retailers (762) and retail stores (570) participating in FMCS educational activities 1979-1981 is included in the Venn Diagrams in Figures 2 and 3. Of the total number of individual retailers participating in FMCS educational activities, 14 attended both workshops and consultation sessions; 11 attended both consultation sessions and seminars; four attended both workshops and seminars; one retailer attended all three of the educational activities.

Evaluative data. A variety of data related to two evaluative instruments used previously by FMCS educators was compiled and analyzed by the researcher. Data were available from the Reaction Evaluations for each of the three workshops 1979, 1980, 1981 and from two Follow-Up Surveys completed in 1980, 1981.

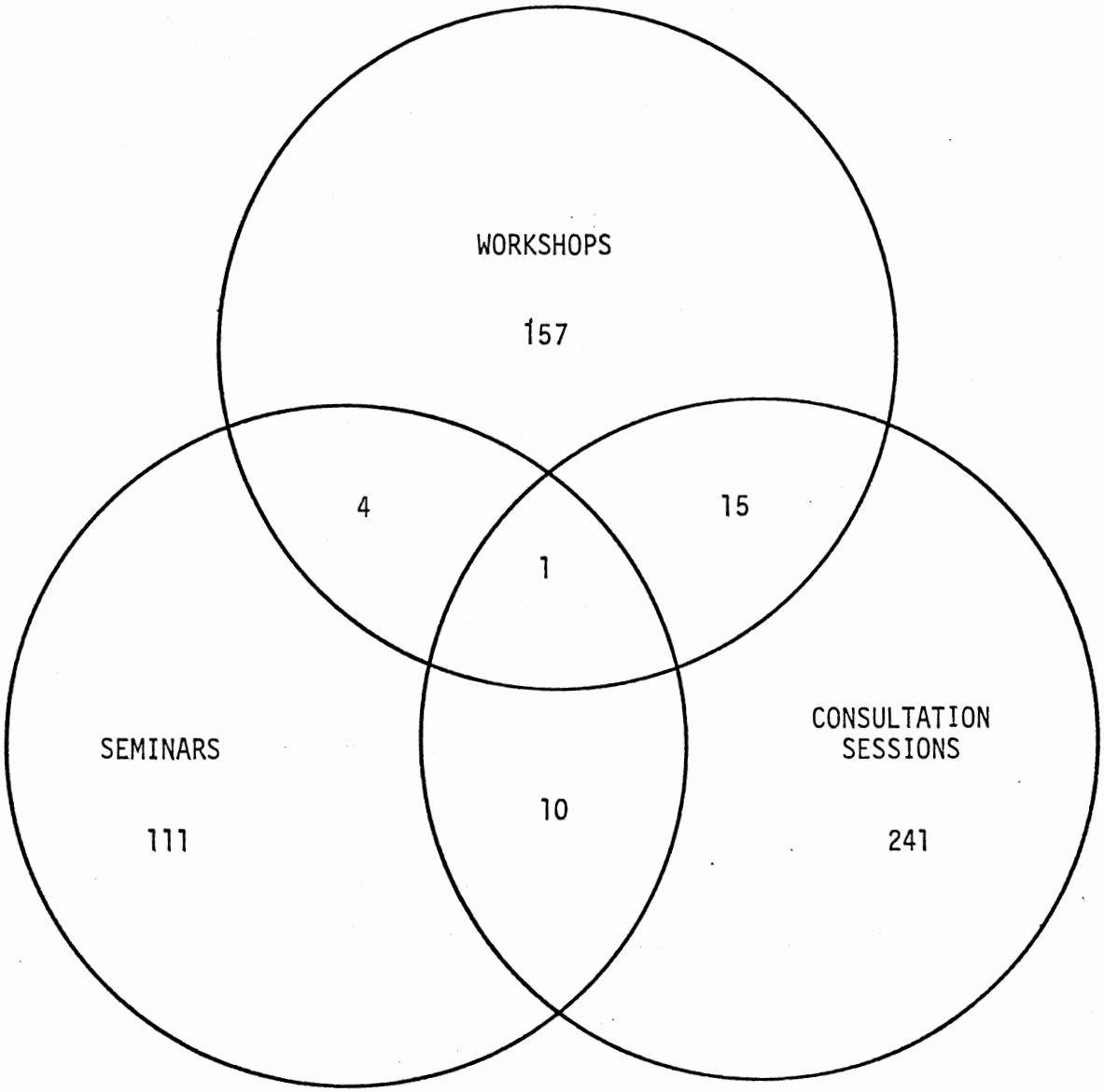
FMCS educators collected Reaction Evaluations in order to receive immediate feedback from participants of each of the three day-long workshops. At the conclusion of the workshops, participants indicated the degree to which they felt the topics were helpful; a Likert type rating scale was used to elicit responses. The responses were hand tabulated by the researcher in order to analyze the participants' reactions to workshop content.

Respondents to the Reaction Evaluation reacted to statements of seven procedural concepts related to retail



Workshop Participants--240
Consultation Session Participants--335
Seminar Participants--187
Total FMCS Participants--762

Figure 2. Total Number of FMCS Participants, 1979-1981



Stores Participating in Workshops--177
Stores Participating in Consultation Sessions--267
Stores Participating in Seminars--126
Total Stores Participating in FMCS--570

Figure 3. Total Number of Stores Participating in FMCS, 1979-1981

activities. Perpetual inventory methods, physical inventory methods, merchandise classification percentages, resource evaluation, dollar merchandise plan, open-to-buy plan, and market open-to-buy were the concepts covered during the day-long workshops; only six procedural concepts were referred to throughout the study since the concept of merchandise classification percentages became part of the concept of physical inventory control. Respondents indicated they "strongly agreed" or "agreed" that each of the seven procedural concepts covered during the workshop were helpful; these results are shown in Appendix B. The researcher used these findings in the design of the Assessment Survey.

A second evaluative instrument, the Follow-up Survey, was developed by FMCS educators. The surveys were mailed to participants four months after the 1980 and 1981 workshops for the following purposes: 1) to identify satisfaction with specific store procedures used by participants prior to attending FMCS workshops; 2) to learn if any procedures recommended during workshops were being used by participants; 3) to identify if changes were made in procedures since attending the workshops.

In December 1980, surveys were mailed to 45 of the 73 participants (stores) who indicated on their Reaction Evaluation that they would be willing to participate in a Follow-up Survey. In January, participants who had not responded were contacted by telephone. The participants

were asked if they would complete the survey over the phone. The response rate of the 1980 survey was 64 percent.

In December 1981, surveys were sent to all of the 55 participants (stores) attending the 1981 workshop. Follow-up telephone calls were made to a random selection of the nonresponding retailers. The response rate to the 1981 Follow-up Survey was 35 percent. The data were tabulated for the two Follow-up Surveys and used in designing the Assessment Survey.

The following is a summary of conclusions based on findings, presented in Appendix C, from the two Follow-up Surveys. The responses to the survey indicated three general trends: 1) respondents indicated that they were not completely satisfied with the procedures they were using prior to attending the workshops; 2) respondents indicated that they, in fact, had made some changes in retail procedures after attending the workshop; 3) a relationship was evident, as presented in Table I, between respondents who were dissatisfied with procedures prior to attending the workshops and percentages of changes made after attending the workshops. Eighty-three percent of the respondents indicated they were not satisfied with planning of open-to-buy purchases in percentages and dollars by classifications and resources prior to attending workshops; 71 percent of the respondents indicated that changes were made in open-to-buy plan after attending workshops. Forty-nine percent indicated that they were not satisfied with physical inven-

TABLE I

RELATIONSHIP BETWEEN DISSATISFACTION WITH STORE PROCEDURES USED BEFORE ATTENDING FMCS WORKSHOP AND CHANGES MADE AFTER ATTENDANCE AS SHOWN BY THE FOLLOW-UP SURVEY

		Dissatisfied Prior to Workshop		Changes Made After Workshop	
Procedures	N = 48	N	%	N	%
Perpetual Inventory System		24	53	26	57
Physical Inventory System		22	49	20	43
Manufacturers' Performance System		36	78	32	71
Open-to-Buy System		38	83	34	71
Open-to-Buy in % and Dollars by Classifications and Resources System		39	83	33	70

tory control system prior to attending workshops; 43 percent indicated changes were made after attending workshops.

The Follow-up Survey did not ask for respondents to enumerate changes made since attending FMCS workshops. The fact that participants indicated changes were implemented in the short space of no longer than four months suggests that participants did consider their store procedures in light of information presented by the FMCS educators.

For the most part, respondents indicated that they were performing a large number of the 15 recommended procedures presented in the workshops. Two procedures, planning end of the month stock and estimating the percentage of merchandise in each classification or category were not being performed by 50 percent or more of the respondents.

Step 2: Design Instrument

The third instrument was designed by the researcher to investigate the impact of the FMCS educational activities in the Dallas Apparel Mart, 1979-1981. The findings from the Reaction Evaluation and the Follow-up Surveys were used to develop the Assessment Survey.

Sample Selection. The researcher developed a number of strategies for deriving the sample. The strategy chosen as the most appropriate way to select the sample was to include the total population, as previously presented in Figure 2, of the participants (762) in the 11 educational activities held at the Dallas Apparel Mart, 1979-1981.

The master list of FMCS participants contained 570 store names and addresses as previously shown in Figure 3. A number of names and addresses were eliminated from the master list for the following reasons: incomplete name or address, fabric stores as indicated by name of store, stores located out of the country.

Only one survey was sent to each store; names of retailers that participated in the educational activities were included on the mailing address. Repeat participants were coded so that only one survey was sent to each store. The final number of stores used for the Assessment Survey was 460. The sample was divided into two groups: 1) 156 retailers who had longer contact with FMCS by participating in the structured all-day workshop and 2) 304 retailers who had shorter contact with FMCS by participating in one-on-one consultation sessions and/or hour-long seminars.

Survey Content and Format. A mail survey was selected as the most feasible method to solicit the opinions of the 460 participants of FMCS educational activities. Rationale for the decision to use a mail survey was based on Dillman's (1978) Total Design Method.

The Assessment Survey was developed based on the following: the three objectives of this investigation; the six terminal objectives of the FMCS workshops as presented in Appendix D; the findings from the Reaction Evaluation; the findings from the Follow-up Survey; and other evaluation studies. The content of the survey evolved from the

following seven categories:

1. Current use of store procedures recommended by FMCS educators.
2. Intent to use store procedures recommended by FMCS.
3. The degree of difficulty encountered with performance of recommended store procedures.
4. The degree of FMCS influence on current store procedures used by participants.
5. Professional help received by participants of FMCS.
6. Changes in attitudes about role as apparel retailers.
7. Future help needed in apparel retailing.

The Assessment Survey was designed for two groups of retailers and consisted of one form for workshop or long contact participants and one form for consultation session and/or seminar or short contact participants. The seven objectives of the Assessment Survey were used to develop the seven parts for the long contact participants; only five of the seven parts were included in the survey for the short contact participants. There were 132 statements included in the entire survey sent to long contact participants. Four sections were designed using a four-point scale to record individual responses. Two sections were designed using a two-response choice format, "yes" or "no." For one section only, individual responses were requested. Both survey forms included demographic data on position(s) in

store, length of time store had been in operation, length of time respondent had been associated with store and size of store in terms of annual sales volume. The content of each part of the Assessment Survey is summarized in Table II.

The content of both surveys, long contact and short contact, was the same in five parts. However, the two parts dealing with 62 statements of current store procedures and 21 statements related to difficulties with store procedures were limited to long contact participants since these participants had been exposed to a more lengthy and in-depth presentation during the day-long workshops.

Step 3: Pretest Survey

The survey was submitted for review to the scrutiny of four groups of authorities. Characteristics of each group, including selection procedures, are presented in Appendix E. Many of the reviewers had substantive knowledge of the survey topics.

Reliability. After perusal of the research literature and conferences with an authority on program evaluation, the researcher selected the test/retest method to establish reliability for the survey. Reliability was established using the procedures summarized in Appendix E.

Aiken's (1980) procedure for computing consistency reliability of single items was used by the researcher to calculate reliability coefficients for each of the 119

TABLE II

CONTENT OF LONG AND SHORT FORMS
OF ASSESSMENT SURVEY

Survey Content	Survey Form
1. Current Store Procedures performed by retailers.	Long
2. Use of Recommended Store Procedures 10 statements; retailers plans for use of store procedures.	Long/Short
3. Degree of Difficulty 21 statements; difficulties encountered by retailers in performance of store procedures.	Long
4. Degree of FMCS Influence 6 statements; FMCS influence on Six Procedural Concepts.	Long/Short
5. Professional Help Received 5 statements; help received by retailers from FMCS.	Long/Short
6. Changes in Attitudes 10 statements; positive changes in role as apparel retail since attending FMCS educational activities.	Long/Short
7. Future Help Needed 18 statements; help needed by retailers	Long/Short

statements in the survey. The formula used was:

$$R = 1 - \frac{\sum_{j=0}^{c-1} \sum_{i=0}^{c-1} n_{ij} |i - j|}{N(c-1)}$$

where: R = Aiken's reliability coefficient
c = Number of categories of responses
N = Number of pairs of responses
i = Category of first response
j = Category of second response
n_{ij} = Number of pairs with 1 response in category i and the other in category j

All statements of four-option responses (for example, all of the time, most of the time, some of the time, none of the time) that received a coefficient of .75 or above were significant at the .05 level; all statements of two-option responses (for example, yes/no) that recieved a coefficient of .80 or above were significant at the .05 level. The critical coefficients were calculated using combinatorial methods. The reliability coefficients of responses to the test/retest are included in Appendix E.

A detailed analysis of the survey was made as a result of the test/retest procedure. Statements whose reliability coefficients were below .05 level of significance were reviewed and modified or deleted.

Validity. Three groups of authorities were used by the researcher to establish content validity for the survey. Content validity was established using the procedures sum-

marized in Appendix E.

Final Revisions. The researcher studied the suggestions from the three groups of reviewers along with the findings from the test/retest portion of the survey. Suggestions were carefully studied before modifications in the survey were made.

Three general types of changes were made in the Assessment Survey and reflected in the final format. Modifications were made in wording of directions, statements and rating scales and by including additional information or deleting words and statements. Changes made in the Assessment Survey are listed in detail in Appendix E and organized according to each of the seven parts of the survey.

The survey format, developed by the researcher, evolved from principles supported by authorities on program evaluation such as Kirkpatrick (1979) and Wentling (1980), reviewing similar surveys in educational literature and conferring with educational authorities. The final format of the survey was designed using recommendations from Dillman's (1978) Total Design Method Theory. Suggestions from the four groups of reviewers were also used in developing the format. The Assessment Survey was printed as a booklet with finished size 5-1/2" x 8-1/2". The almond colored booklet was designed using the cover sheet as an envelope. A commemorative stamp was placed on the side with the return address. Copies of both survey forms are

included in Appendix F.

In the summer of 1982, the Fashion Merchandising Consultant Services (FMCS) was changed and expanded to establish the Center for Apparel Marketing and Merchandising (CAMM). The Center for Apparel Marketing and Merchandising logo, CAMM, was included on the front side of the survey booklet. At the suggestion of the researcher and with approval from the CAMM director, the following offer was made to all respondents of the Assessment Survey: each respondent (store) would become a charter member of CAMM and receive a six-month free CAMM membership including two CAMM Newsletters, and one CAMM Research Report.

Step 4: Collect and Compile Data from Assessment Survey

The Survey was mailed to 460 participants (stores) on November 12, 1982. The long form was sent to 156 workshop participants; the short form was sent to 304 participants who attended consultation sessions and/or seminars.

Follow-up Activities. Follow-up activities were developed for non-respondents of the long form survey. Post cards were mailed to all retailers who were sent a survey. The message was designed based on recommendations made by Dillman (1978). The cards were mailed two weeks after the mailing of the surveys. Twenty-two long form surveys and 27 short form surveys were returned after the initial mailing and the follow-up cards were sent.

All workshop participants who had not returned the Assessment Survey by the end of December were telephoned by a FMCS assistant or the researcher during January and February. Thirty-nine retailers requested that a second copy of the Assessment Survey be sent to them. Twenty-nine Assessment Surveys were received after personal phone contact with these retailers. Due to limited participation of those retailers who attended consultation sessions and seminars, no telephone contacts were made to non-respondents of the short form of the Assessment Survey.

A log was kept by the researcher indicating major points the non-respondents mentioned during the telephone conversations: request for another survey, desire not to participate in the Assessment Survey study, request to call back later when the participant was in the store. A second copy of the Assessment Survey was sent to those retailers who asked to be sent another copy.

Analysis of Data. Data were put on floppy disks for use on a Texas Instruments Professional Microcomputer. All data related to responses from FMCS workshop participants (stores) were recorded together on one disk file. Responses from consultation session and seminar participants (stores) were put on another disk file. Programs, using BASIC language, were designed and developed for statistical analysis of the Assessment Survey by a computer programmer in consultation with the researcher.

Frequency Distributions. Frequency distributions were obtained for all 119 statements included in the surveys sent to long contacts and for 47 statements included in the surveys sent to short contacts. Open-ended statements where the respondents were to indicate other categories were not included in the frequency distributions. Some of the rating scales for the statements were left blank by the respondents. Therefore, the frequency distribution for each statement was based on the number who responded to that statement.

Chi-square. The frequency data were analyzed to identify relationships between responses to statements and the demographic variables of age of store and annual sales volume. Chi-square analysis is appropriate where frequency data are used to identify relationships between categories. Responses to the Assessment Survey were analyzed according to the following four groups: 1) long contacts (workshop participants); 2) short contacts (consultation session and seminar participants); 3) a combination of long and short contact participants; 4) length of contact--short versus long.

Chi-square analysis was performed to identify relationships between the retailers' responses to the survey and the demographic variables of store age, annual sales volume and length of contact. Chi-square analysis was also performed on long contact retailers' responses to selected pairs of statements.

The .05 level of significance was selected by the researcher as being appropriate for the chi-square analysis in this study (Kerlinger, 1973). The findings from the chi-square analysis were reported and used in suggesting ways to improve and expand FMCS educational activities.

Stage II: Assessment of Impact

The first objective of the assessment study was to assess the impact of FMCS educational activities on apparel retailers. In order to achieve this objective, Stage II included the following steps: 1) develop profile of respondents; 2) compile reactions of respondents to six procedural concepts; and 3) compile reactions of respondents to FMCS.

Step 1: Develop Profile of Respondents

Data collected from the Assessment Survey are organized into two major headings: responses from participants of workshops, referred to as "long contacts," and responses from participants of consultation sessions and seminars, referred to as "short contacts." Data dealing with each of the two groups of respondents are organized and discussed in terms of the number of respondents and characteristics of stores and retailers.

Number of respondents. Data on the number of surveys sent to long contact respondents and short contact respondents are reported in table format. The total number of

responses and non-responses for each of the two groups are presented by year and type of educational activity--workshops, consultation sessions or seminars. The number of surveys returned for each group of retailers is also included. The returned rate for the two groups of retailers as well as the total rate of return for both groups is calculated.

Characteristics of Stores and Retailers. Demographic data dealing with four variables, namely age of store, years associated with store, annual sales volume and position in store, are included in one table. The data are organized into frequencies and percentages of demographic characteristics of long contacts and short contacts. Responses to position in store are categorized into ten mutually exclusive groups. Major findings from the demographic data related to stores and retailers are discussed in detail in Chapter IV.

Step 2: Compile Reactions to Six Procedural Concepts

Reactions from long contact respondents related to six procedural concepts of perpetual inventory control, physical inventory control, manufacturers' performance, dollar merchandise plan, open-to-buy plan and market open-to-buy were studied and organized into the following two areas: 1) current use of retail procedures discussed during the three day-long workshops and 2) degree of difficulty experienced

with retail procedures. Findings related to each of the six procedural concepts are reported in tables and discussed in detail in Chapter IV.

Four categories were established for each of the six procedural concepts:

1) use of retail procedures "all of the time" or "most of the time" by 70 percent or more of the respondents;
2) use of retail procedures "some of the time" or "none of the time" by 30 percent or more of the respondents;
3) performance of retail procedures with "no difficulty" or "slight difficulty" experienced by 70 percent or more of the respondents;
4) performance of retail procedures with "moderate difficulty" or "serious difficulty" experienced by 30 percent or more of the respondents.

All tables give combined frequencies and percentages of two ratings; for example, the ratings "all of the time" and "most of the time" were collapsed and analyzed together; the ratings "some of the time" and "none of the time" were collapsed and analyzed together.

Step 3: Compile Reactions to FMCS

The reactions of both long contact and short contact respondents were combined to analyze the influences of FMCS

on retailers. These influences were grouped into four parts:

1) degree of FMCS influence on six retail procedures;
2) professional help received from FMCS;
3) changes in retailers' attitudes about role as apparel retailer since attending FMCS;
4) retailers' plans to use procedures recommended by FMCS;
5) future needs of retailers including written comments from retailers related to additional needs and presented in Appendix G.

The methods used to report and organize the findings were summarized in Appendix H.

Stage III: Analysis of the Strengths and Weaknesses

The second objective of the assessment study was to analyze the strengths and weaknesses in FMCS educational activities. In order to achieve this objective, Stage III included the following steps: 1) analysis of strengths and weaknesses in FMCS educational activities, and 2) identification of statistically significant relationships between length of contact, store age, annual sales volume and responses of retailers.

Step 1: Ascertain Strengths and Weaknesses

Strengths and weaknesses in FMCS educational activities were identified from responses of retailers in order to suggest ways to improve and to expand FMCS. Three procedures were developed, as shown in Figure 4, to ascertain strengths and weaknesses related to the following: 1) summaries of data related to procedures performed and difficulties encountered, 2) summaries of data related to influence of FMCS on retailers, and 3) summaries of comments from retailers.

Procedures Performed and Difficulties Encountered. Data related to procedures performed and difficulties encountered from three evaluative instruments, Reaction Evaluation, Follow-up Survey and the Assessment Survey, were classified as strengths or weaknesses associated with FMCS workshops and are presented in Appendix I. Data were classified as strengths if 70 percent or more of the retailers indicated that

1) all or most of the time a procedure was performed or
2) no or only slight difficulty was experienced with a procedure.

Data were classified as weaknesses if 30 percent or more of the retailers indicated that

1) some or none of the time a procedure was performed or

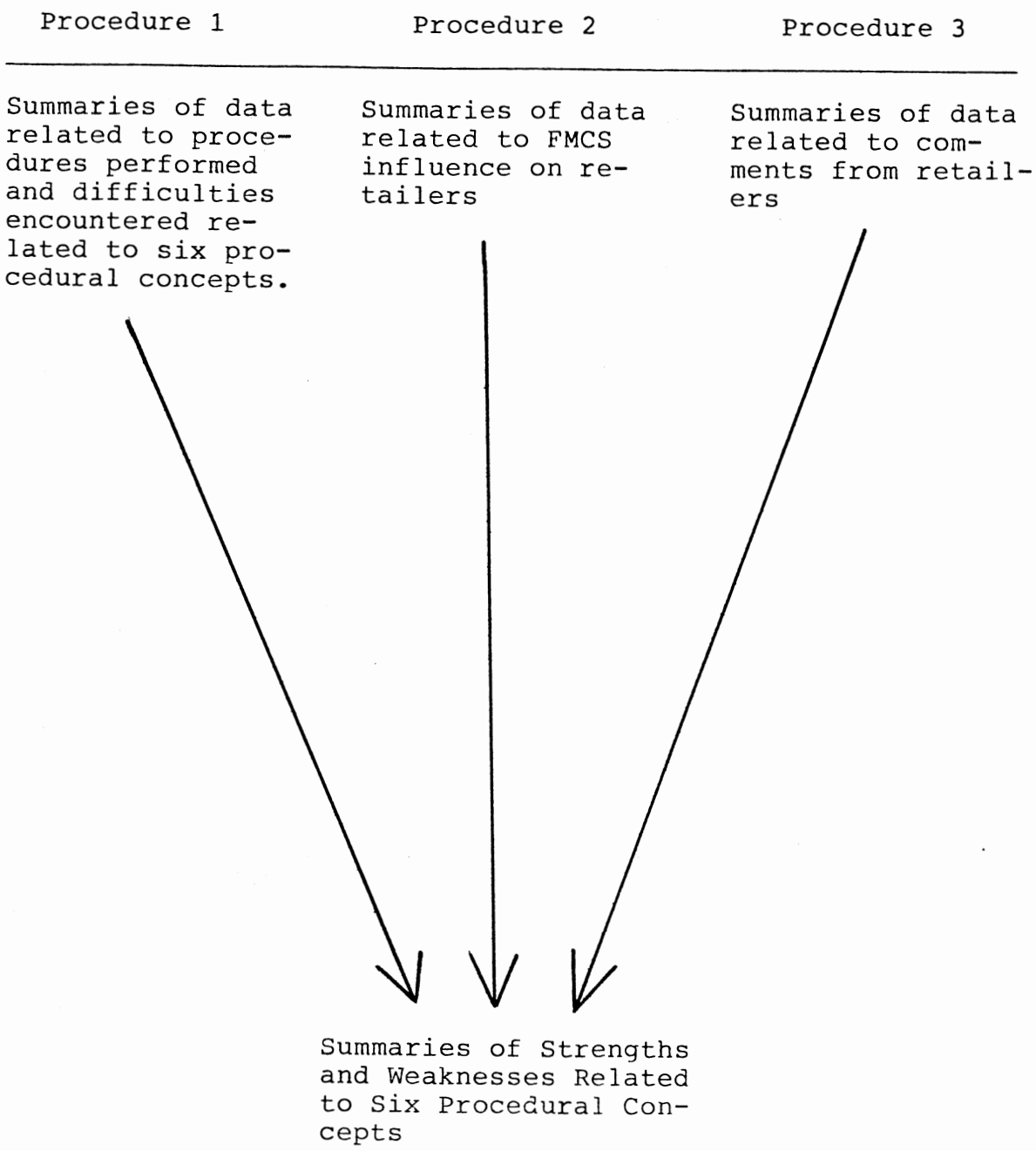


Figure 4. Procedures Related to Identification of Strengths and Weaknesses in FMCS Educational Activities

2) moderate or serious difficulty was experienced with a procedure.

Strengths and weaknesses in FMCS workshops were arbitrarily based on these criteria in order to ascertain evidences of strengths and weaknesses in FMCS educational activities 1979-1981. A summary of strengths in FMCS workshops associated with six procedural concepts is presented in Appendix I.

FMCS Influence on Retailers. Twenty-one statements related to FMCS influence on retailers were organized under the following three concepts: 1) FMCS influence on retailers' performance of six procedural activities; 2) professional help received from FMCS; and 3) retailers' changes in attitudes about role as apparel retailers since attending FMCS educational activities.

Evidence of FMCS impact on retailers was identified if 51 percent or more of the respondents:

1) indicated influence from FMCS to perform a procedure or
2) indicated that professional help was received from FMCS or
3) indicated a more positive attitude toward their role as apparel retailers.

Strengths in FMCS educational activities were indicated by evidences of FMCS impact on retailers; impact was established based on the single criterion of positive responses from 51 percent or more of the retailers. All 21 statements

met the criteria established to identify evidences of FMCS impact on retailers.

Comments from Retailers. Written comments from retailers are listed and organized under positive, negative, and general comments; the lists are included in Appendix J. Information on size of store and annual sales volume was also included after each statement. Comments are then summarized into a short discussion.

The lists of comments just described were used to identify strengths and weaknesses in the FMCS educational activities. The strengths and weaknesses were then used to make suggestions for ways to improve and to expand FMCS educational activities.

Step 2: Identify Relationships

Chi-square analysis was used to identify statistically significant relationships between responses of retailers and 1) length of contact (long contact or short contact), 2) age of store, 3) annual sales volume.

For all four-response statements, two pairs of ratings of responses were combined as all contingency tables used in the chi square analysis were 2 x 2 tables. Chi-square with Yates' continuity correction was used to indicate relationships. Fisher's Exact Test (Everitt, 1977) was used to verify the level of significance when cell expected frequencies were small.

Chi-square analysis was also used to identify sta-

tistically significant relationships between retailers' responses to selected pairs of responses. Statements from the Assessment Survey were systematically selected for a chi-square analysis to establish if the same group of retailers tended to answer paired statements in a similar manner. The criteria established to select pairs of statements were the following:

1) the two statements related to the same retail activity or
2) the two statements related to procedure performed and FMCS influence on that procedure.

Pairs of statements were selected and analyzed using chi-square analysis. Statements that indicated significant chi-square were included in a table; summaries were developed and reported for each statistically significant pair of statements. These summaries were used for suggestions of ways to improve and expand FMCS educational activities.

Stage IV: Formulation of Recommendations

The third objective of the assessment study was to formulate recommendations to improve and expand the FMCS educational activities. Stage IV included the following steps in order to achieve the third objective: 1) formulate suggestions based on findings from Assessment Survey; 2) formulate suggestions based on the concept of andragogy; 3) propose recommendations to improve and expand FMCS educational activities.

Step 1: Formulate Suggestions

Based on Assessment Survey

Suggestions of ways to improve and to expand FMCS educational activities were based on the following findings from the Assessment Survey: 1) strengths and weaknesses based on procedures performed and difficulties encountered related to six procedural concepts; 2) evidences of FMCS impact on retailers' procedures and attitudes; 3) positive and negative comments from retailers; 4) statistically significant relationships based on responses from retailers; 5) retailers' plans to use procedures recommended by FMCS; 6) future needs of retailers. Suggestions of ways to improve and to expand FMCS educational activities were organized into the following two groups: suggestions related to improvements in existing FMCS educational activities and suggestions related to expansions of FMCS educational activities.

Suggestions Related to Six Procedural Concepts. Suggestions of ways to improve and to expand FMCS workshops were organized under the six procedural concepts: perpetual inventory control, physical inventory control, manufacturers' performance, dollar merchandise plan, open-to-buy plan and market open-to-buy. Within each of the six concepts, suggestions were classified into one of three categories, "continue," "modify" and "monitor." Criteria were established for each of the three categories.

The criteria arbitrarily established for procedures to be grouped into the "continue" category included the following:

1) 72 percent or more of the retailers performed procedures all or most of the time.
2) 72 percent or more of the retailers performed procedures with no or slight difficulty.
3) 51 percent or more of the retailers reported that FMCS had great or some influence on procedures.

The criteria established for procedures to be grouped into the "modify" category included the following:

1) less than 69 percent of the retailers performed procedures all or most of the time.
2) less than 69 percent of the retailers performed procedures with no or slight difficulty.
3) less than 51 percent of the retailers reported that FMCS had great or some influence on procedures.

The criteria established for procedures to be grouped into the "monitor" category included the following:

1) 71 percent to 69 percent of the retailers performed procedures all or most of the time.
2) 71 percent to 69 percent of the retailers performed procedures with no or slight difficulty.
3) procedures which fall into "continue" category using

one criterion and into "modify" using another. All borderline cases and discrepancies in the "monitor" category need to be evaluated periodically by FMCS educators before making changes.

Several strategies to modify procedures discussed during the workshops are listed in Appendix K. These strategies could be implemented by FMCS in order to improve the workshop presentation.

Suggestions Related to General Concepts. Suggestions for ways to improve and to expand FMCS educational activities were identified that related to general concepts of FMCS. These suggestions were based on the following findings from the Assessment Survey:

1) evidences of FMCS impact on retailers' store procedures and attitudes;
2) positive and negative comments from retailers;
3) statistically significant relationships based on responses from retailers;
4) retailers' plans to use procedures recommended by FMCS;
5) future needs of retailers.

The five groups of findings were used to organize the suggestions of ways to improve and to expand FMCS. Each suggestion was followed by a brief discussion of the findings.

Findings from the Assessment Survey dealing with FMCS influence on retailers were used to indicate that FMCS had

made an impact with retailers. The criteria established for influences to be grouped under strengths of FMCS educational activities were the following:

1) 51 percent or more of the retailers reported they were influenced by FMCS to perform procedures related to six procedural concepts.
2) 51 percent or more of the retailers indicated that FMCS did help them.
3) 51 percent or more of the retailers indicated their attitude toward their role as apparel retailer was more positive since contact with FMCS.

Retailers were asked to respond to future help needed in retailing. Those areas that 51 percent or more of the retailers indicated great or some help was needed were enumerated and considered in making suggestions for expansion of FMCS educational activities.

Step 2: Formulate Suggestions
Based on the Concept of Andragogy

Suggestions of ways to improve and expand FMCS educational activities were developed based on theories of adults as learners. Knowles (1980) was used as a major authority on adult learners. A list of selected characteristics of adults as learners was developed and presented in Appendix L based on a list of characteristics of adult learners formulated by an authority in the area of adult education.

The researcher prepared an additional list of

observations of retailers attending two FMCS workshops. The two lists presented in Appendix M were used to develop suggestions on ways to improve and expand FMCS educational activities using the concept of andragogy and the findings of the Assessment Survey. Suggestions were based on several considerations, namely: 1) the type of educational activity presented--non-credit structured workshops; 2) the type of participants--retailers from a variety of stores/shops with varying amounts of work experiences and interest in receiving help in basic retailing procedures; and 3) the limitations of time and location imposed on FMCS and retailers since the time/location had to coincide with market week and the amount of "free" time available for retailers to attend the workshop was limited.

Step 3: Propose Recommendations

Recommendations to improve and to expand FMCS educational activities were based on 1) suggestions related to findings from the Assessment Survey, 2) suggestions based on the concept of andragogy and 3) future needs reported by retailers. Recommendations were organized into two categories: 1) ways to improve existing FMCS educational activities and 2) ways to expand FMCS educational activities.

Eight major recommendations were proposed to improve and expand FMCS educational activities: four recommendations were proposed for improvements of FMCS existing day-long

workshops; four recommendations were proposed for expansion of FMCS educational activities.

In summary, recommendations to improve and to expand FMCS educational actitivies were based on strengths and weaknesses of FMCS educational activities and suggestions reported from retailers on future help needed. The strengths and weaknesses were systematically developed from the findings of the Assessment Survey. Final recommendations incorporated interpretations of the concept of andragogy made by the researcher.

CHAPTER IV

FINDINGS

The purposes of this study were to assess an ongoing university extension program conducted by Fashion Merchandising Consultant Services (FMCS), for apparel retailers at the Dallas Apparel Mart, 1979-1981, and to formulate recommendations for improvement and expansion of FMCS educational activities. The three objectives of the study were the following: 1) to assess the impact of FMCS educational activities on apparel retailers; 2) to analyze the strengths and weaknesses in FMCS educational activities; 3) to formulate recommendations to improve and expand FMCS educational activities. The findings were organized into the following topics related to each of the three objectives of the study: assessment of impact, analysis of the strengths and weaknesses, formulation of recommendations.

Assessment of FMCS Impact

The first objective of the study involved the assessment of the impact of FMCS educational activities on retailers. The findings relate to the impact of the 11 FMCS activities as experienced by retailers who participated in one or more of the following: the three, day-long,

workshops held in May, 1979, August, 1980 and 1981; 2) six, one-on-one consultation sessions held during three-day market in 1980, 1981; and 3) two hour-long seminars held in August and October 1981. The discussion of the findings was organized in three categories: 1) profile of respondents, 2) performance of FMCS procedures, 3) perception of FMCS influence.

Profile of Respondents

The profile of respondents to the FMCS Assessment Survey was organized into two major areas: number of respondents and characteristics of stores and retailers. The following discussion related to these two areas.

Number of Respondents. Seventy-two usable surveys were returned by 570 retail stores participating in one or more of the 11 FMCS educational activities. The return rate was 33 percent for the long contact (workshop) participants and 9 percent for the short contact (consultation session or seminar) participants. The total rate of return for both the long and short contact participants was 17 percent. The classification of responses and non-responses to the Assessment Survey data were grouped in Appendix N according to type of educational activity attended by participants and to the year attended.

Retailers from 18 states responded to the survey with the majority coming from the South: 35 percent of the retailers were from Texas; 13 percent from Oklahoma; 12

percent from Louisiana; 6 percent each from Arkansas and Mississippi; 5 percent from Kansas. Other states represented were Alabama, California, Colorado, Florida, Illinois, Iowa, Minnesota, Missouri, Nebraska, New Mexico, Ohio and Tennessee.

Characteristics of Stores and Retailers. Data pertaining to the age of store, annual sales volume, length of time associated with store and positions in store are presented in Table III. Data were divided into long contacts (workshop respondents), and short contacts (consultation session and seminar respondents). The target audience identified for FMCS educational activities was the apparel retailer who has been in business less than five years with an annual retail sales volume of less than $500,000. The FMCS workshops were developed to meet some of the basic needs of this type of retailer.

Approximately half (49%) of the respondents indicated their stores had been in operation five years or less: 70 percent of the short contacts compared to 41 percent of the long contacts. Almost two thirds (62%) of the respondents indicated they had been associated with their stores five years or less. Annual sales volume between $100,001 and $300,000 was reported by approximately half (49%) of the respondents, 19 percent had less than $100,000 in annual sales.

Only 11 percent of the respondents did not check the owner category. The majority (65%) of the respondents

TABLE III

PROFILE OF STORES AND RETAILERS PARTICIPATING IN ASSESSMENT SURVEY

	Long Contact N=51		Short Contact N=21		Total	
Age of Store	N	%	N	%	N	%
0 to 5 years	20	41	14	70	34	49
5.1 to 10 years	11	22	1	5	12	17
10.1 to 20 years	9	18	2	10	11	16
Over 20 years	9	18	3	15	12	17
Total	49	99[a]	20	100	69	99a
Years Associated with Store	N	%	N	%	N	%
0 to 5 years	25	54	16	80	41	62
5.1 to 10 years	13	28	2	10	15	23
10.1 to 20 years	7	15	1	5	8	12
Over 20 years	1	2	1	5	2	3
Total	46	99[a]	20	100	66	100
Annual Sales Volume	N	%	N	%	N	%
Below $100,000	4	8	9	43	13	19
$100,001 to $300,000	27	55	7	33	34	49
$300,001 to $500,000	6	12	2	10	8	11
$500,001 to $1,000,000	6	12	3	14	9	13
Over $1,000,000	6	12	0	0	6	9
Total	49	99[a]	21	100	70	101[a]
Position in Store	N	%	N	%	N	%
Owner, Manager, Buyer, Salesperson	12	24	10	48	22	31
Owner, Manager, Buyer	7	14	1	5	8	11
Owner, Manager	0	0	1	5	1	1
Owner, Buyer, Salesperson	5	10	1	5	6	9
Owner, Buyer	0	0	1	5	1	1
Owner	20	41	4	19	24	34
Manager, Buyer	2	4	1	5	3	4
Manager	1	2	1	5	2	3
Buyer, Salesperson	2	4	0	0	2	3
Buyer	0	0	1	5	1	1
Total	49	99[a]	21	102[a]	70	98[a]

[a]Does not equal 100 percent due to rounding.

checked that they were owner (34%) or a combination of owner, manager, buyer, salesperson (31%) of their stores. Several respondents added other types of positions for which they were responsible, including office manager, bookkeeper, accountant, and janitor. One of the respondents commented, "I have 2 salespeople, 1 alterations person, so I wear about 17 hats."

Performance of FMCS Procedures

Data related to the six procedural concepts presented in the three FMCS workshops were obtained only from respondents identified in the study as long contact (N=51). The findings were concerned with the performance of activities related to the six procedural concepts emphasized during each of the formal day-long workshops.

Participants in one or more of the workshops (long contacts) were asked to react to performance statements related to six procedural concepts incorporated in the learning materials used in the three workshops held at the Dallas Apparel Mart, May, 1979, August, 1980, and August 1981. These six concepts were related to the following: 1) perpetual inventory control, 2) physical inventory control, 3) manufacturers' performance, 4) dollar merchandise plan, 5) open-to-buy, and 6) market open-to-buy. The criteria discussed in Chapter III were used to present and analyze the findings related to each of the six procedural concepts: procedures performed all or most of the time by

70 percent or more of the respondents; procedures performed some or none of the time by 30 percent or more of the respondents; no or slight difficulty experienced by 70 percent or more of the respondents; and moderate or serious difficulty experienced by 30 percent or more of the respondents.

Perpetual Inventory Control. The terminal objective related to perpetual inventory control was, "You will be able to initiate a perpetual inventory system that will be suitable for major merchandise classifications." The three performance objectives related to this terminal objective are included in Appendix D.

Four perpetual inventory control procedures which 70 percent or more of the retailers indicated they performed all or most of the time are listed in Table IV. As expected, 100 percent of the retailers included the retail price on price tickets; 92 percent included garment size on price tickets. Eighty-eight percent indicated that they used purchase orders or logs, journals, invoices to obtain merchandise information for use on price tickets and to record merchandise received. Over 75 percent indicated the reasons they recorded merchandise information were concern with reordering (87%), slow/fast sellers (78%) and manufacturers' performance (78%).

Four perpetual inventory control procedures which 30 percent or more of the retailers indicated they performed only some or none of the time are listed in Table V. Only

TABLE IV

PERPETUAL INVENTORY CONTROL PROCEDURES
PERFORMED ALL OR MOST OF THE TIME
BY 70 PERCENT OR MORE OF THE
WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	All or Most of the time[a] N	%
1. Use purchase orders[b] to obtain merchandise information for use on price tickets.		48	42	88
2. Include the following kinds of information on price tickets:				
date received		43	33	77
manufacturer's code number		45	34	76
style number		49	42	86
garment size		51	47	92
retail price		51	51	100
3. Record the following kinds of information on my purchase orders[b]:				
merchandise received		50	44	88
merchandise returned to manufacturer		46	34	74
4. Record merchandise information for the following reasons:				
make decisions about re-ordering		45	39	87
watch progress of slow/fast sellers		46	36	78
evaluate manufacturers' performance		49	38	78

[a]All of the time, always, 90-100 percent of the time.
Most of the time, usualy, 51-89 percent of the time.
[b]Purchase orders, logs, journals, invoices.

TABLE V

PERPETUAL INVENTORY CONTROL PROCEDURES
PERFORMED SOME OR NONE OF THE TIME
BY 30 PERCENT OR MORE OF THE
WORKSHOP RESPONDENTS

Procedures Performed N=51	Total Responses N	Some or None of the time[a] N	%
1. Include the following kinds of information on price tickets:			
coded cost (wholesale) price	42	20	48
color	43	27	63
2. Keep price ticket stubs to record information about merchandise received and sold.	51	22	43
3. Record the following kinds of information on my purchase orders[b]			
merchandise sold	46	17	37
merchandise marked down	44	21	48
merchandise returned by customer	46	21	46
4. Record merchandise information in order to determine stock shortages.	43	15	35

[a]Some of the time, sometimes, 11-50 percent of the time.
None of the time, never, 0-10 percent of the time.
[b]Purchase orders, logs, journals, invoices.

some or none of the time, 63 percent included color on price tickets; 48 percent included coded cost (wholesale) price on price tickets and recorded information on merchandise marked down.

No or only slight difficulty was reported by 70 percent or more of the respondents for two procedures as presented in Table VI. Ninety-six percent of the respondents indicated they had no or only slight difficulty in gathering merchandise information to include on price tickets; 79 percent concluded that they had no or only slight difficulty in recording information on merchandise received and sold.

Thirty percent or more of the respondents had moderate to serious difficulty in the performance of the two perpetual inventory control procedures listed in Table VII; 41 percent of the retailers indicated that they had moderate or serious difficulty in recording information on merchandise marked down. Approximately one third (33%) of the retailers indicated that they had moderate or serious difficulty in recording information on merchandise returned by the customer or merchandise returned to the manufacturer.

Physical Inventory Control. The terminal objective related to physical inventory control was, "You will be able to identify physical inventory control systems which are appropriate for certain merchandise classifications according to percentages." Three performance objectives related to this terminal objective are included in Appendix D.

TABLE VI

PERPETUAL INVENTORY CONTROL PROCEDURES PERFORMED WITH NO OR SLIGHT DIFFICULTY BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	No or Slight Difficulty N	%
1. Gathering merchandise information to include on price tickets.		50	48	96
2. Recording information on merchandise received and sold.		47	37	79

TABLE VII

PERPETUAL INVENTORY CONTROL PROCEDURES PERFORMED WITH MODERATE OR SERIOUS DIFFICULTY BY 30 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	Moderate or Serious Difficulty N	%
1. Recording information on merchandise marked down		46	19	41
2. Recording information on merchandise returned by the customer or merchandise returned to the manufacturer		46	15	33

Three physical inventory control procedures which 70 percent or more of the retailers indicated they performed all or most of the time are listed in Table VIII. Most of the respondents indicated that they used stock count information to make decisions about reordering (91%) and watch the progress of slow/fast sellers (91%); 90 percent indicated they did take stock counts at regular intervals for staple or basic merchandise.

Two physical inventory control procedures which 30 percent or more of the retailers indicated they performed only some or none of the time are listed in Table IX. Thirty-seven percent of the respondents reported that they used stock count information to comply with IRS requirements only some or none of the time; 32 percent estimated for each major merchandise classification the percentage of the total inventory only some or none of the time.

Retailers were asked to respond to three statements dealing with degree of difficulty they encountered in performing physical inventory control procedures. Seventy percent or more of the respondents had no or only slight difficulty in the performance of the three physical inventory control procedures listed in Table X. Eighty-seven percent of the respondents indicated no or only slight difficulty in counting stock by eyeballing (visual control method); 78 percent in regularly counting stock using the stock count method; 74 percent in estimating the percentage of major classifications of merchandise.

TABLE VIII

PHYSICAL INVENTORY CONTROL PROCEDURES
PERFORMED ALL OR MOST OF THE TIME
BY 70 PERCENT OR MORE OF THE
WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	All or Most of the time[a] N	%
1. Use eyeballing (visual control method) to determine current stock levels in the following kinds of merchandise				
one of a kind		47	35	74
new fashions not stocked in depth		46	33	72
merchandise kept in open view		45	35	78
2. Take stock counts at regular intervals for the folloiwng kinds of mechandise:				
staple or basic merchandise		48	43	90
hosiery		39	33	85
3. Use stock count information for the following purposes:				
make decisions about reordering		47	43	91
watch progress of slow/ fast sellers		44	40	91
determine stock shortages		43	32	74

[a]All of the time, always, 90-100 percent of the time.
Most of the time, usually, 51-89 percent of the time.

TABLE IX

PHYSICAL INVENTORY CONTROL PROCEDURES
PERFORMED SOME OR NONE OF THE TIME
BY 30 PERCENT OR MORE OF THE
WORKSHOP RESPONDENTS

		Total Responses	Some or None of the time[a]	
Procedures Performed	N=51	N	N	%
1. Estimate for each major merchandise classification, the percentage of the total inventory		44	14	32
2. Use stock count information to comply with IRS requirements		41	15	37

[a]Some of the time, sometimes, 11-50 percent of the time.
None of the time, never, 0-10 percent of the time.

Table X

PHYSICAL INVENTORY CONTROL PROCEDURES PERFORMED WITH NO OR SLIGHT DIFFICULTY BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed N=51	Total Responses N	No or Slight Difficulty N	%
1. Counting stock by eyeballing (visual control method).	46	40	87
2. Regularly counting stock using the stock count method.	45	35	78
3. Estimating the percentage of major classifications of merchandise.	47	35	74

Thirty percent or more of the retailers did not report any moderate or serious difficulty with procedures related to physical inventory control. Therefore, no table was needed to present moderate or serious difficulties.

Manufacturers' Performance. The terminal objective related to manufacturers' performance was, "You will be able to analyze the performance records of the manufacturer." Two performance objectives related to this terminal objective are included in Appendix D.

Procedures performed all or most of the time by 70 percent or more of the retailers are presented in Table XI. Over 90 percent of the respondents reported that all or most of the time, they used information on sales at full retail price (96%) and/or information from markdowns to periodically evaluate manufacturers' performance (91%).

Procedures performed some or none of the time by 30 percent or more of the respondents are presented in Table XII. Sixty-five percent of the retailers reported that they evaluated manufacturers' performance on co-op advertising only some or none of the time.

Retailers were asked to indicate degree of difficulty they encountered in analyzing manufacturers' performance as reported in Table XIII. Eighty percent of the respondents indicated that they had no or only slight difficulty evaluating manufacturers' performance; 71 percent reported that they had no or only slight difficulty knowing when to reorder merchandise.

TABLE XI

MANUFACTURERS' PERFORMANCE PROCEDURES PERFORMED ALL OR MOST OF THE TIME BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

		Total Responses	All or Most of the time[a]	
Procedures Performed	N=51	N	N	%
Use the following kinds of information to periodically evaluate manufacturers' performance:				
sales at full retail price		48	46	96
markdowns		47	43	91
returns		45	34	76
reorders		43	37	86

[a]All of the time, always, 90-100 percent of the time. Most of the time, usually, 51-89 percent of the time.

TABLE XII

MANUFACTURERS' PERFORMANCE PROCEDURES PERFORMED SOME OR NONE OF THE TIME BY 30 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

		Total Responses	Some or None of the time[a]	
Procedures Performed	N=51	N	N	%
Use the following kinds of information to periodically evaluate manufacturers' performance:				
terms of payment		39	17	44
co-op advertising		40	26	65

[a]Some of the time, sometimes, 11-50 percent of the time. None of the time, never, 0-10 percent of the time.

TABLE XIII

MANUFACTURERS' PERFORMANCE PROCEDURES PERFORMED WITH NO OR SLIGHT DIFFICULTY BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

		Total Responses	No or Slight Difficulty	
Procedures Performed	N=51	N	N	%
1. Knowing when to reorder merchandise		48	34	71
2. Evaluating manufacturers' performance		49	39	80

Thirty percent or more of the retailers did not report any moderate or serious difficulty with procedures related to manufacturers' performance. Therefore, no table was needed to present moderate or serious difficulties.

Dollar Merchandise Plan. The terminal objective related to dollar merchandise plan was "You will be able to complete the dollar merchandise plan." Five performance objectives related to this terminal objective are presented in Appendix D.

Three procedures which 70 percent or more of the retailers indicated they performed all or most of the time are listed in Table XIV. Over 90 percent of the respondents indicated that they estimated planned sales for a specific period by checking sales volume for the same period the previous year (94%) and that they estimated stock level needed to support planned monthly sales according to stock-to-sales ratio based on their own figures (93%).

Five procedures used in the dollar merchandise plan which 30 percent or more of the retailers indicated they performed only some or none of the time are listed in Table XV. National figures on stock-to-sales ratio were used by 82 percent of the retailers only some or none of the time to estimate stock level needed to support planned monthly sales. Sixty-five percent indicated that they estimated planned markdown percentages according to planned store promotions only some or none of the time.

Seventy percent or more of the respondents had no or

TABLE XIV

DOLLAR MERCHANDISE PLAN PROCEDURES PERFORMED ALL OR MOST OF THE TIME BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	All or Most of the time[a] N	%
1. Estimate planned sales for a specific period by:				
checking sales volume for same period last year		49	46	94
estimating the percentages of sales increase/decrease over last year		47	41	87
2. Estimate stock level needed to support planned monthly sales based on stock-to-sales ratio based on own figures		45	42	93
3. Calculate retail dollar amount of merchandise for a given period by using the following:				
planned sales volume		45	38	84
beginning of the month figures		38	27	71

[a]All of the time, always, 90-100 percent of the time. Most of the time, usually, 51-89 percent of the time.

TABLE XV

DOLLAR MERCHANDISE PLAN PROCEDURES PERFORMED SOME OR NONE OF THE TIME BY 30 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	Some or None of the time[a] N	%
1. Estimate planned sales for a specific period by:				
considering promotional events planned		45	14	31
distributing the rate of sales increase/decrease by the month		37	15	41
2. Estimate stock level needed to support planned monthly sales based on stock-to-sales ratio based on national figures.		34	28	82
3. Use past records of markdowns to determine planned markdowns for a given period.		48	27	56
4. Estimate planned markdown percentages according to the following:				
a. planned store promotions		37	24	65
b. planned store clearances		44	16	36
5. Calculate retail dollar amount of merchandise for a given period by using markdown goals.		34	20	59

[a]Some of the time, sometimes, 11-50 percent of the time. None of the time, never, 0-10 percent of the time.

only slight difficulty in the performance of two dollar merchandise plan procedures listed in Table XVI. Ninety-four percent of the retailers indicated that they had no or only slight difficulty in maintaining adequate past sales records.

The five dollar merchandise plan procedures related to moderate or serious difficulty encountered by 30 percent or more of the retailers are presented in Table XVII. More than half (53%) of the respondents indicated moderate or serious difficulty in keeping stock/sales in balance for a specific period; 44 percent reported moderate to serious difficulty in determining desirable stock-to-sales ratio.

Open-to-Buy Plan. The terminal objective related to the open-to-buy plan was "You will be able to calculate an open-to-buy budget for a seasonal period." Three performance objectives related to this terminal objective are included in Appendix D.

Seventy percent or more of the respondents indicated, as presented in Table XVIII, that they performed all three of the open-to-buy plan procedures all or most of the time. Ninety-two percent of the retailers performed the two open-to-buy procedures concerned with the use of keystoning to arrive at retail price and the considerations of commitments in calculating open-to-buy plans.

Only one procedure met the criteria of 70 percent or more who had no or only slight difficulty as presented in

TABLE XVI

DOLLAR MERCHANDISE PLAN PROCEDURES PERFORMED WITH NO OR SLIGHT DIFFICULTY BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

	Total Responses	No or Slight Difficulty	
Procedures Performed N=51	N	N	%
1. Maintaining adequate past sales records.	47	44	94
2. Estimating the percentage of sales increase/decrease over last year's sales volume.	49	42	86

TABLE XVII

DOLLAR MERCHANDISE PLAN PROCEDURES PERFORMED WITH MODERATE OR SERIOUS DIFFICULTY BY 30 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	Moderate or Serious Difficulty N	%
1. Estimating consumer demand for merchandise in future seasons.		49	21	43
2. Determining desirable stock-to-sales ratio.		48	21	44
3. Maintaining adequate past markdown records.		46	19	41
4. Establishing markdown policy for merchandise.		47	19	40
5. Keeping stock/sales in balance for a specific period.		47	25	53

TABLE XVIII

OPEN-TO-BUY PLAN PROCEDURES PERFORMED ALL OR MOST OF THE TIME BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed N=51	Total Responses N	All or Most of the time[a] N	%
1. Calculate open-to-buy at cost for the purchase of new merchandise each season.	51	44	86
2. Arrive at retail prices by doubling (keystone method) the wholesale price.	51	47	92
3. Consider merchandise already purchased for delivery during a specific period (purchase commitments) before calculating open-to-buy plans.	50	46	92

[a]All of the time, always, 90-100 percent of the time. Most of the time, usually, 51-89 percent of the time.

Table XIX. Judging what the customer is willing to pay for merchandise presented no or only slight difficulty for 90 percent of the retailers. However, over 30 percent of the retailers, as reported in Table XX, had moderate or serious difficulty with two procedures, planning merchandise delivery dates (50%) and calculating commitments for a given period (44%).

Market Open-to-Buy. The terminal objective related to market open-to-buy was "You will be able to plan the percent and dollar amounts of planned open-to-buy purchases by classifications and resources." Two performance objectives related to this terminal objective are included in Appendix D.

Seventy percent or more of the retailers indicated that they performed both of the procedures all or most of the time, as presented in Table XXI. Eighty-two percent calculated market open-to-buy for each major merchandise classification; 73 percent allocated open-to-buy based on performance ratings of major manufacturers in each classification.

Seventy percent or more of the respondents indicated no or slight difficulty with two market open-to-buy procedures as presented in Table XXII. Eighty-three percent reported no or slight difficulty in making fashion judgments appropriate for store image and target customer. Finding time to visit potential resources (manufacturers) at market was a procedure that 73 percent of the retailers showed no

TABLE XIX

OPEN-TO-BUY PLAN PROCEDURES PERFORMED WITH NO OR SLIGHT DIFFICULTY BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

	Total Responses	No or Slight Difficulty	
Procedures Performed N=51	N	N	%
1. Judging what customer is willing to pay for merchandise.	48	43	90

TABLE XX

OPEN-TO-BUY PLAN PROCEDURES PERFORMED WITH MODERATE OR SERIOUS DIFFICULTY BY 30 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

	Total Responses	Moderate or Serious Difficulty	
Procedures Performed N=51	N	N	%
1. Planning merchandise delivery dates.	48	24	50
2. Calculating commitments for a given period.	48	21	44

TABLE XXI

MARKET OPEN-TO-BUY PROCEDURES PERFORMED ALL OR MOST OF THE TIME BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	All or Most of the time[a] N	%
1. Calculate open-to-buy for each major merchandise classification.		51	42	82
2. Allocate open-to-buy based on performance ratings of major manufacturers in each classification		51	37	73

[a]All of the time, always, 90-100 percent of the time. Most of the time, usually, 51-89 percent of the time.

TABLE XXII

MARKET OPEN-TO-BUY PROCEDURES PERFORMED WITH NO OR SLIGHT DIFFICULTY BY 70 PERCENT OR MORE OF THE WORKSHOP RESPONDENTS

Procedures Performed	N=51	Total Responses N	No or Slight Difficulty N	%
1. Making fashion judgments appropriate for store image and target customer.		48	40	83
3. Finding time to visit potential resources (manufacturers) at market.		49	36	73

or slight difficulty in performing.

Thirty percent or more of the retailers did not report any moderate or serious difficulties with procedures related to market-open-to-buy. Therefore, no table was needed to present moderate or serious difficulties.

Perception of FMCS Influence

The total sample (N=72), both long and short contacts, were asked to react to statements concerning the influence of FMCS on retailers. These influences were investigated in regard to several factors: 1) the six retail procedural concepts; 2) the professional help received from FMCS; 3) the changes in retailers' attitudes about role as apparel retailer since attending FMCS; 4) the retailers' plans to use procedures recommended by FMCS; and 5) future needs.

Data related to influence of the various FMCS educational activities on retailers from both long (N=51) and short (N=21) contacts were combined since no statistically significant differences were found between the responses of the two groups. Following is a summary of the findings in regard to the five factors previously listed. Criteria used to report the findings stated that influences of FMCS were perceived as positive when 51 percent or more of the retailers responded as follows: 1) "great or some" to the extent of FMCS influence on six procedures; 2) "yes" to help received from FMCS in regard to five concepts; 3) "yes" to changes in attitudes about

role as apparel retailer. The criteria discussed in Chapter III were used to present and analyze the findings related to perceived influences of FMCS.

Influence on Procedures. Findings indicated that FMCS had great or some influence on 50 percent or more of the retailers in regard to the performance in all six procedural concepts as shown in Table XXIII. Approximately three-fourths of the total number of respondents (72) indicated that FMCS educational activities had great or some influence on their recording of merchandise received and sold (76%) and on their evaluation of the performance of major manufacturers (73%).

Professional Help Received. The respondents were asked to indicate if FMCS had helped them in relation to five additional concepts. Positive answers (yes) by 51 percent or more of the respondents to statements about help received from FMCS are reported in Table XXIV. Over three-fourths of the respondents indicated that FMCS had helped them in all five of the additional concepts; 91 percent of the respondents indicated that FMCS had helped them to become aware of ways to improve their retailing skills.

Changes in Attitudes. Retailers were asked to indicate whether they had noticed more positive attitudes toward their role as apparel retailers since attending FMCS educational activities. The retailers responded to ten

TABLE XXIII

GREAT OR SOME FMCS INFLUENCE ON SIX PROCEDURES INDICATED BY 51 PERCENT OR MORE OF THE RESPONDENTS

Procedures Performed N=72	Total Responses	Great or Some Influence	
	N	N	%
1. Record information on merchandise received and sold	67	51	76
2. Take stock counts to control inventory for basic stock	68	40	59
3. Evaluate the performance of major manufacturers	66	48	73
4. Make seasonal dollar merchandise plans	64	44	69
5. Project seasonal open-to-buy by cost (wholesale)	64	44	69
6. Distribute open-to-buy among major manufacturers	63	41	65

TABLE XXIV

"YES" ANSWERS BY 51 PERCENT OR MORE OF RESPONDENTS TO STATEMENTS ABOUT HELP RECEIVED FROM FMCS

FMCS Helped Retailer to N=72	Total Responses N	"Yes" N	"Yes" %
1. Build confidence in ability to make changes in store procedures.	67	52	78
2. Organize routine procedures.	66	53	80
3. Analyze manufacturers' performance.	67	51	76
4. Meet and interact with other apparel retailers and discuss common problems and opportunities.	65	52	80
5. Become aware of ways to improve retailing skills.	67	61	91

statements: six statements related to the six procedural concepts presented in the formal workshops and discussed in less detail during the informal consultation sessions and seminars, and four general statements related to retailers' beliefs about their role as apparel retailers.

All ten of the statements received positive answers (yes) from 51 percent or more of the retailers as shown in Table XXV. Ninety-two percent of the total respondents reported positive changes in their attitude toward analyzing merchandise records before making buying decisions; 87 percent reported a more positive attitude toward suggestions from professional retail consultants; 87 percent reported positive changes in their attitude toward dealing with buying and merchandising. In contrast, only 69 percent reported changes in their attitude toward distributing open-to-buy according to merchandise classification and only 64 percent indicated that FMCS had influenced the changes in their attitudes toward apparel retailing as a financially rewarding career.

Use of Recommended Procedures. Retailers were asked if they had planned any changes in store procedures after attending FMCS activities and if they had received positive reinforcement that the store procedures they were using should be continued. In addition, retailers who planned to make store changes but did not were asked to indicate reasons why.

Of the retailers who responded to these statements,

TABLE XXV

"YES" ANSWERS BY 51 PERCENT OR MORE OF THE RESPONDENTS TO STATEMENTS RELATED TO CHANGES IN ATTITUDES ABOUT ROLE AS APPAREL RETAILER

Positive Change in Attitude Toward: N=72	Total Responses N	"Yes" N	"Yes" %
1. Analyzing merchandise records before making buying decisions.	64	59	92
2. Taking stock counts.	64	47	73
3. Identifying manufacturers with good track records.	66	55	83
4. Making seasonal dollar merchandise plan.	61	49	80
5. Using projected sales and inventory needs to plan dollar open-to-buy.	64	49	77
6. Distributing open-to-buy according to merchandise classification.	65	45	69
7. Dealing with buying and merchandising decisions and responsibilities.	63	55	87
8. Apparel retailing as a financially rewarding career.	61	39	64
9. Apparel retailing as a creatively satisfying and personally rewarding career.	64	51	80
10. Suggestions from professional retail consultants.	52	46	88

seven percent did not plan any changes in store procedures after attending FMCS. Of the retailers who had planned some changes in store procedures but had not implemented changes, 33 percent indicated one reason was lack of time. Fifty-three percent of the retailers reported that they received positive reinforcements that some of the store procedures they were using should be continued.

Future Needs. Retailers were asked to indicate the degree of future help needed related to retail strategies. Findings indicated that 51 percent or more of the respondents reported that they needed great or some help in 11 of the 17 areas (65%) listed in Table XXVI. Three-fourths or more of the total number of respondents reported help was needed in learning ways to increase store traffic (85%), improve cash flow (83%), increase sales per square foot (76%), and improve turnover (75%). Four retailers included written comments related to specific needs not included in the survey; these needs are listed in Appendix G.

Analysis of the Strengths and Weaknesses in FMCS Educational Activities

The second objective of the study was to analyze the strengths and weaknesses in FMCS educational activities. The findings were obtained by implementing the procedures described in Chapter III for Stage III of the study. The following discussion of the analysis of the data included

TABLE XXVI

SOME OR GREAT HELP NEEDED BY 51 PERCENT OR MORE OF THE RESPONDENTS

	Total Responses	Some or Great	
Help Needed To: N=72	N	N	%
1. Improve cash flow.	69	57	83
2. Decrease overhead cost.	67	42	63
3. Deal with credit.	68	39	57
4. Dispose of slow selling merchandise.	68	48	71
5. Improve turnover.	67	50	75
6. Benefit from computer use.	63	42	67
7. Increase sales per square foot.	67	51	76
8. Improve customer loyalty.	67	35	52
9. Increase store traffic.	67	57	85
10. Improve interior/exterior displays.	67	40	60
11. Improve advertising/promotion.	65	42	65

two categories: strengths and weaknesses in FMCS educational activities and statistically significant relationships.

Strengths and Weaknesses of FMCS

Strengths and weaknesses of FMCS were organized into two categories: 1) procedures performed and difficulties encountered and 2) FMCS influence on retailers. The following discussion analyzes the strengths and weaknesses in FMCS educational activities.

Procedures Performed and Difficulties Encountered.

All data from the Assessment Survey related to procedures performed and difficulties encountered from long contact participants (N=51) were classifed into strengths or weaknesses using the criteria established in Chapter III. These strengths and weaknesses are presented in Appendix I. The summary lists of strengths and weaknesses were used to make suggestions for FMCS educational activities.

Three major conclusions were drawn by the researcher from analyzing the strengths and weaknesses in the FMCS educational activities. A discussion of the three conclusions related to the six procedural concepts presented during the day-long workshops follows:

1. Strengths in FMCS were most evident in four of the procedural concepts.

   Perpetual Inventory Control Procedures;

   10 out of a total of 17 procedures were performed

by 70 percent or more of the retailers; 2 out of a total of 4 procedures gave retailers no or only slight difficulty.

Physical Inventory Control Procedures;

8 out of a total of 10 procedures were performed by 70 percent or more of the retailers; 2 out of a total of 4 procedures gave retailers no or only slight difficulty.

Manufacturers' Performance Procedures;

4 out of a total of 6 procedures were performed by 70 percent or more of the retailers; both of the 2 procedures gave retailers no or only slight difficulty.

Market Open-to-Buy Procedures;

Both of the 2 procedures were performed by 70 percent or more of the retailers; both of the 2 procedures gave retailers no or only slight difficulty.

2. Weaknesses in FMCS were most evident in one of the procedural concepts.

Dollar Merchandise Plan Procedures;

7 out of a total of 12 procedures were not performed by 70 or more of the retailers; 5 out of a total of 7 procedures gave retailers moderate or serious difficulty.

3. The number of strengths and weaknesses were almost equal in one of the procedural concepts.

Open-to-buy Plan Procedures;

all of the 3 procedures were performed by 70 percent or more of the retailers; but 2 of the 3 procedures gave retailers moderate or serious difficulty.

FMCS Influence on Retailers. The summary of data related to evidence of FMCS impact from the long and short contact participants (N=72) included FMCS influence on retailers in regard to 1) performance of six procedures, 2) professional help received from FMCS, and 3) retailers' changes in attitudes about role as apparel retailer since attending FMCS educational activities.

All data related to FMCS influences were classified as positive conclusions using the criteria established and reported in Chapter III. Three of the most important FMCS influences were the following:

1) 92 percent reported a more positive attitude toward analyzing merchandise records before making buying decisions;
2) 91 percent indicated FMCS helped them to become aware of ways to improve retailing skills;
3) 70 percent or more of the retailers reported that FMCS had great or some influence on them in performing activities related to two procedural concepts.

These positive conclusions were used to make suggestions for FMCS educational activities.

Comments from Retailers. Comments from 18 retailers were grouped into positive comments, negative comments and general comments and are presented in Appendix J. No pattern emerged from these comments but many indicated that FMCS had helped the participants in their role as apparel retailers. Several positive comments related to the worth of FMCS educational activities were from new apparel owners with annual sales volume below $300,000. Retailers tended to write more positive comments (15) than negative comments (3). The list of comments was considered in making suggestions for FMCS educational activities.

Statistically Significant Relationships

An analysis of the responses from retailers identified the statistically significant relationships between selected variables as proposed in the procedures discussed in Stage III, Chapter III. Relationships between responses of retailers and three variables, length of contact, age of store, and annual sales volume, as well as relationships between responses to selected pairs of statements were used to suggest ways to improve and to expand FMCS educational activities.

Length of Contact. The chi-square test was used to identify statistically significant relationships between the variables of length of FMCS contact (long and short) and responses from retailers. There were no statistically

significant relationships between length of contact and responses of retailers. Since there was no significant difference between the responses of the long and short contacts, these two groups were combined, whenever appropriate, in other analyses.

Age of Store. Relationships between age of store and responses from retailers were analyzed using chi-square analysis. For the purpose of this chi-square analysis, stores were divided into two groups by age: those in business five years or less (N=41) and those in business more than five years (N=25). There were no statistically significant relationships between store age and any of the 121 long contact statements or the 49 short contact statements in the Assessment Survey used for the purpose of the study.

Annual Sales Volume. Chi-square calculations were used to identify statistically significant relationships between annual sales volume and responses of retailers. Stores with annual sales volume of $300,000 or less were classified as small stores; stores with annual sales volume of over $300,000 were classified as large stores.

There were nine relationships that were statistically significant at the .05 level. The range for chi-square was from 5.52 to 10.03. The list of relationships presented in Table XXVII was organized into retailers from small stores and retailers from large stores; information on type

TABLE XXVII

SUMMARY OF STATISTICALLY SIGNIFICANT[a] RELATIONSHIPS BETWEEN RETAILERS' RESPONSES TO SURVEY AND ANNUAL SALES VOLUME

Relationship	Type of Contact	Chi-Square[b]
Retailers from small stores more than large stores[c] tended to:		
1. Include coded cost (wholesale) price on price tickets.	Long	10.03
2. Include style number on price tickets.	Long	8.29
3. Record merchandise sold on purchase orders	Long	5.75
4. Record on purchase orders merchandise marked down.	Long	6.10
5. Record on purchase orders merchandise returned to manufacturer.	Long	7.59
6. Be influenced by FMCS to record information on merchandise received and sold.	Long	6.56
7. Be influenced by FMCS to evaluate the performance of major manufacturers	Long and Short	6.67
8. Have a more positive attitude toward suggestions from professional retail consultants.	Long and Short	5.52
Retailers from large stores[c] more than small stores tended to:		
9. Have moderate or serious difficulty in establishing markdown policy for merchandise.	Long	6.67

[a]Statistically significant at the .05 level.
[b]Degrees of freedom = 1; critical value for chi-square is 3.84.
[c]Large store - over $300,000 annual sales volume.

of FMCS contact and chi-square was also included.

Six perpetual inventory procedures (1-6) tended to be performed more by retailers of small stores than large stores. It was noted that retailers from large stores may tend to use more sophisticated methods of perpetual inventory control such as style cards or computerized data sheets instead of the perpetual inventory control methods recommended by FMCS.

Only one significant relationship (7) directly related to manufacturers' performance by retailers of small stores. Retailers from small stores more than large stores tended to be influenced by FMCS to evaluate the performance of major manufacturers. However, retailers from large stores may have more knowledge about manufacturers due to a greater variety of previous dealings of this type.

Only one relationship (8) related to the general concept of change in attitude since attending FMCS educational activities by retailers of small stores. Retailers from small stores more than large stores tended to have more positive attitude toward suggestions from professional retailer consultants. Retailers from smaller stores, because of limited exposure or experience in the retailing arena, may tend to be more open to suggestions from outside professional consultants.

Only one significant relationship (9) directly related to dollar merchandise plan by retailers from large stores. Retailers from large stores more than small stores tended

to have moderate or serious difficulty in establishing markdown policy for merchandise. It is possible that retailers from large stores may establish markdown policy for merchandise by using techniques previously learned or devised before attending FMCS activities.

Responses to Pairs of Statements. Chi-square calculations were performed on responses to selected pairs of statements in order to indicate possible tendencies of retailers; the two statements related to the same retail activity or the two statements related to procedures performed and FMCS influence on that procedure. There were 31 pairs of statements that met the criteria established by the researcher and detailed in Chapter III. There were six pairs of statements that indicated statistically significant relationships at the .05 level as reported in Table XXVIII.

Four relationships suggested that when retailers performed an activity all or most of the time, they tended to encounter no or slight difficulty. Conversely, when retailers performed an activity some or none of the time, they tended to encounter moderate or serious difficulty. Two paired statements indicated respondents influenced by FMCS all or most of the time tended to calculate open-to-buy at cost for the purchase of new merchandise each season and allocate open-to-buy based on performance ratings of major manufacturers in each classification. These findings were used to develop suggestions for improving and expanding

TABLE XXVIII

SUMMARY OF STATISTICALLY SIGNIFICANT[a] RELATIONSHIPS BETWEEN RETAILERS' RESPONSES TO SELECTED PAIRS OF STATEMENTS

Relationship	Chi-Square[b]
When retailers performed the following procedures all or most of the time, they also tended to encounter little or no difficulty with the procedure:	
1. Record information on markdowns.	5.36
2. Estimate the percentage of total inventory for each merchandise classification.	12.95
3. Use information on markdowns to periodically evaluate manufacturers' performance.	6.01
4. Use past records of markdowns to determine planned markdowns for a given period.	5.18
When retailers performed the following procedures all or most of the time, they also tended to have received great or some influence from FMCS to perform the procedure:	
1. Calculate open-to-buy at cost for the purchase of new merchandise each season.	4.47
2. Allocate open-to-buy based on performance ratings of major manufacturers in each classification	9.30

[a]Statistically significant at the .05 level.
[b]Degrees of freedom = 1; critical value for chi-square is 3.84.

FMCS educational activities.

Recommendations to Improve and to Expand FMCS Educational Activities

The third objective of the assessment study was to formulate recommendations to improve and expand the FMCS educational activities. The following categories were used to present the conclusions: 1) suggestions of ways to improve and to expand FMCS educational activities based on findings from Assessment Survey; 2) suggestions of ways to improve and to expand FMCS educational activities based on the concept of andragogy; and finally, 3) recommendations to improve and to expand FMCS workshops, consultation sessions and seminars.

Suggestions based on Findings from Assessment Survey

Suggestions on ways to improve and to expand FMCS workshops were organized into two groups: suggestions related to six procedural concepts and suggestions related to general concepts. These suggestions were based on criteria established in Stage IV of the study and discussed in Chapter III.

Suggestions Related to Six Procedural Concepts. Suggestions to improve and to expand FMCS workshops were grouped under the six procedural concepts used in the

Assessment Survey. The suggestions were organized into those procedures to continue, those to modify and those to monitor using the criteria established in Chapter III. Twenty-three suggestions were included in the continue category; 15 suggestions were included in the modify category; and 3 suggestions were indicated in the monitor category as presented in Table XXIX.

Several strategies developed by the researcher to modify procedures discussed during the FMCS workshops are listed in Appendix K. Booklets on single topics, prepared by FMCS educators, could put more emphasis on areas where retailers need more help. Small groups of retailers could discuss problems related to certain procedures. These discussions, lead by experienced retailers, could help retailers to understand the need to perform procedures they were not performing at all or not performing regularly. These strategies could be implemented by FMCS in order to improve the workshop presentation.

Suggestions related to General Concepts. Five suggestions of ways to improve and to expand FMCS were identified related to the general concepts of FMCS educational activities. Each suggestion precedes a brief discussion of related findings previously reported in more detail.

1. The FMCS educational activities made an impact on the retailers participating in both long and short contacts and should be continued and expanded

TABLE XXIX

SUGGESTIONS RELATED TO SIX PROCEDURAL CONCEPTS

Perpetual Inventory Control Procedures

Continue[a]	Modify[b]	Monitor[c]
1. Include perpetual inventory control concept in workshops. 2. Include the importance of using purchase orders, logs, journals, invoices to obtain information for use on price tickets. 3. Discuss recording the following information on price tickets: date received, manufacturer's code number, style number, garment size, retail price. 4. Discuss reasons to include information on merchandise received on purchase orders. 5. Emphasize using perpetual inventory control to analyze decisions related to reordering merchandise, watching progress of slow/fast sellers and evaluating manufacturers' performance.	1. Discuss in more detail the importance of recording and analyzing price tickets information on color and coded cost (wholesale) price. 2. Stress the importance of split price tickets which provide stubs to use in manually recording information about merchandise received and sold. 3. Stress the need to record the following information on purchase orders, logs, journals, invoices: merchandise sold, merchandise marked down, merchandise returned by customer and merchandise returned to the manufacturer. 4. Emphasize the importance of stock shortage information to improve security policies. 5. Stress the importance of recording information on merchandise returned by customer or merchandise returned to manufacturer.	None

TABLE XXIX (Continued)

Physical Inventory Control Procedures

Continue[a]	Modify[b]	Monitor[c]
1. Include physical inventory control concept. 2. Emphasize use of visual control methods for some merchandise classifications. 3. Accentuate the importance of taking stock counts at regular intervals for basic stock. 4. Emphasize using physical inventory control to make decisions about reordering, watching progress of slow and fast sellers and identifying stock shortages.	1. Stress the importance of using stock count information for income tax purposes.	1. Identify the percentage of the total inventory for each major classification.

Manufacturers' Performance Procedures

Continue[a]	Modify[b]	Monitor[c]
1. Include the concept of manufacturers' performance. 2. Stress periodically evaluating manufacturers' performance by analyzing percentage of sales at full price, markdowns, returns and reorders.	1. Discuss in more detail the importance of evaluating manufacturers' performance by checking terms of payment and manufacturers' policy on co-op advertising.	1. Strategies for reordering merchandise.

TABLE XXIX (Continued)

Dollar Merchandise Plan Procedures

Continue[a]	Modify[b]	Monitor[c]
1. Include the dollar merchandise plan. 2. Emphasize the need to plan sales for a specific period by checking sales volume for the same period last year and by estimating the percent of sales increase/decrease over last year. 3. Discuss the reasons for estimating stock level needed to support planned monthly sales based on stock-to-sales ratio derived from store's figures. 4. Emphasize the need to use planned sales for a given period to calculate retail dollar amounts of merchandise for a given period.	1. Stress the importance of using information from the rate of sales increase or decrease by the month to plan sales for a specific period. 2. Indicate strategies to determine desirable stock-to-sales ratio and emphasize that stock-to-sales figures based on national figures could be used to estimate stock levels needed to support monthly sales. 3. Emphasize the importance of using past records of markdowns to estimate planned markdowns for a given period. 4. Indicate more strongly the need to maintain adequate past markdown records, to plan markdown percentages based on planned store promotions and planned store clearances and to establish markdown policy for merchandise.	1. Importance of using information on planned promotional events to project sales volume for a specific period.

TABLE XXIX (Continued)

Continue[a]	Modify[b]	Monitor[c]
Dollar Merchandise Plan Procedures (Continued)		
	5. Emphasize the need to calculate the value of purchases for a given period by considering markdown goals so that stock and sales could be kept in balance and at the same time to keep stock/sales in balance for a specific period. 6. Indicate ways to estimate consumer demand for merchandise in future seasons.	
Open-to-buy Plan Procedures		
1. Include open-to-buy concept. 2. Discuss the necessity of calculating open-to-buy at cost for the purchase of new merchandise each season. 3. Emphasize the use of the keystone method for establishing retail prices.	1. Emphasize strategies in planning merchandise delivery dates. 2. Stress the importance of calculating commitments for a given period.	None

TABLE XXIX (Continued)

Continue[a]	Modify[b]	Monitor[c]
Open-to-buy Plan Procedures (Continued)		
4. Indicate the importance of considering merchandise already purchased for delivery during a specific period before calculating open-to-buy.		
Market Open-to-buy Procedures		
1. Include market open-to-buy concept. 2. Emphasize the importance of calculating open-to-buy for each major merchandise classification. 3. Include information on making fashion judgments appropriate for store image and target customer. 4. Include the need to find time to visit potential resources at market.	None	None

[a]Criteria for procedures to be included in the continue category:
72 percent or more of the retailers performed procedures all or most of the time.

TABLE XXIX (Continued)

72 percent or more of the retailers performed procedures with no or slight difficulty.
51 percent or more of the retailers reported that FMCS had great or some influence on procedures.

[b]Criteria for procedures to be included in the modify category:
less than 69 percent of the retailers performed procedures all or most of the time.
less than 69 percent of the retailers performed procedures with no or slight difficulty.
less than 51 percent of the retailers reported that FMCS had great or some influence on procedures.

[c]Criteria for procedures to be included in the monitor category:
71 percent to 69 percent of the retailers performed procedures all or most of the time.
71 percent to 69 percent of the retailers performed procedures with no or slight difficulty.
procedures which fall into "continue" category using one criterion and into "modify" using another criterion.

based on the retailers' reactions to FMCS.

The reactions of retailers toward the impact of FMCS on their retail procedures and attitudes supported suggestion number one. Based on criteria established in the chapter on procedures, the following conclusions were reached: retailers were influenced by FMCS to perform Procedures related to six procedural concepts; retailers received help from FMCS to deal with their professional responsibilities as apparel retailers; and retailers reported a more positive attitude toward their role as apparel retailers following their contacts with FMCS.

2. A continued effort is needed to keep in contact with participants of FMCS educational activities in order to help them learn more about effective ways to manage their retail stores.

Comments from retailers indicated that they were interested in learning retailing procedures that would provide immediate help in their decision-making activities. They were pleased that FMCS was concerned about their unique needs and problems.

3. FMCS needs to plan future educational activities to meet the differing needs of two target audiences: retailers from small stores (annual sales volume under $300,000) and retailers from large stores (annual sales volume over $300,000).

Chi-square analysis indicated significant relationships between annual sales volume of stores and responses from

retailers to procedures performed. Retailers from small stores were performing some procedures more often than retailers from larger stores. FMCS should consider the specific needs of the two homogeneous groups of retailers: retailers associated with smaller stores and retailers associated with larger stores.

4. Retailers need some additional assistance on how to effectively and efficiently initiate changes in store procedures based on recommendations from FMCS.

Only seven percent of the retailers indicated that they did not plan any changes in store procedures after attending FMCS educational activities. Nineteen percent indicated that they did plan changes but because of lack of time to try suggestions presented by FMCS, they did not initiate any changes.

5. A continued effort is needed to develop additional ways to offer professional help to retailers in areas of greatest concern.

Seventy percent or more of the retailers indicated that they needed help in learning ways to a) improve cash flow, b) dispose of slow selling merchandise, c) improve turnover, d) increase sales per square foot, e) increase store traffic. These findings were previously presented in Table XXVI. Chi square analysis indicated that retailers from large stores more than small stores tended to report that they needed help in learning ways to effectively deal

with personnel and help in learning ways to decrease overhead cost. As mentioned previously, FMCS should consider two groups of retailers, each with different needs.

In summary, based on the findings of the Assessment Survey, retailers' feelings toward FMCS were positive and a definite strength in the educational activities conducted by FMCS. The role of FMCS as educator, catalyst and facilitator seemed to be apparent and appreciated by retailers attending the educational activities conducted by FMCS. The researcher enumerated suggestions related to FMCS educational activities dealing with six procedural concepts. Each procedure was classified into one of three categories: "continue," "modify," and "monitor." Five suggestions related to general concepts were identified.

Suggestions based on the Concept of Andragogy.

The needs of adult learners were considered by the researcher in making suggestionsto improve and to expand FMCS' dealings with adults as learners. Well known adult educators such as Knowles (1980), Knox (1979), Cross (1981), Havighurst (1975), and Tough (1979) reported the necessity to differentiate between the desire of adults to learn and the need of children to learn.

Three suggestions on ways to improve and expand FMCS educational activities related to retailers in their role as learners were based on the following: 1) a list of

selected characteristics of adults as learners developed by the researcher and based on the concept of andragogy and presented in Appendix L; and 2) a summary of observations, presented in Appendix M, of retailers attending FMCS workshops made by the researcher during two all-day workshops conducted at the Dallas Apparel Mart. The following three suggestions were formulated for consideration in improving and expanding FMCS educational activities:

1. Develop a variety of strategies to help retailers of different ages and experiences to benefit from FMCS educational activities. The speed of learning for adults tends to slow down in relation to chronological age (Knox, 1977). The past experiences of individuals must also be considered in establishing ways to help retail participants in FMCS educational activities.

2. Develop strategies to achieve a more comfortable psychological climate for adult learners. According to Knowles (1980)

> I am convinced that what happens in the first hour or so on any learning activity (course, seminar, workshop, institute, tutorial, etc.) largely determines how productive the remaining hours will be. I see the setting of a climate that is conducive to learning as perhaps the single most critical thing I do as a facilitator of learning. What happens at the opening session will do more than anything else to set the climate for the entire activity. It is at this point that participants get the feeling that they are seen as unique individuals who are respected and cared about for their individuality or as a part of an anonymous mass (p. 224).

3. Develop strategies to insure that the participants of a formal educational activity share similar interests

and concerns. For some groups of adults, more learning is accomplished when the group is homogeneous.

In summary, three suggestions were developed by the researcher to improve and expand FMCS educational activities. Although the suggestions were based on the concept of andragogy, consideration was also given to the development of suggestions that would support and/or relate to the findings from Assessment Survey.

Final Recommendations

Final recommendations for FMCS educational activities were based on suggestions related to findings from the Assessment Survey and suggestions related to the concept of andragogy. The concluding recommendations were organized into those concerned with the improvement of FMCS educational activities at the time of the Assessment and those related to the expansion of the FMCS educational activities in the future.

Recommendations for Improvement of FMCS. Retailers indicated that a wide range of procedures recommended by FMCS were performed by them with no or slight difficulty. The techniques and activities developed by FMCS educators to present and explain these procedures should therefore be continued with no major modifications. The procedures that satisfied the criteria established for "continue" should be considered in regard to this recommendation.

Four recommendations made to improve the existing

workshops were as follows:

1. Proposal: FMCS should revise the workshop session dealing with dollar merchandise plan.

   Retailers indicated that they were not performing some procedures and that they encountered moderate or serious difficulty in performing some procedures; many of the procedures related to dollar merchandise plan were not being performed by retailers. More time could be allocated for formal presentation of the concept to retailers. Activities related to dollar merchandise plan could be reorganized and modified to give the retailers more explicit information. Retail Apparel Guides at each table could be instructed to spend some specific time to answer any questions related to dollar merchandise plan such as ways to use past records of markdowns to estimate planned markdowns for a given period.

2. Proposal: The actual time explaining a concept should be lengthened for homogeneous groups of adults with less retail experience and/or for retailers in small stores.

   The techniques and activities developed by FMCS need to be modified to provide more explanation for procedures not being performed by retailers or for those procedures performed with moderate or serious difficulty. Different examples or techniques such as developing mini-fact sheets for retailers related to particular concepts could be used for

small table discussion after formal presentation by FMCS educators. Again, the Retail Apparel Guides at each of the tables could lead the discussions which would include a question and answer session. In addition, the procedures that satisfied the criteria established for "modify" should be considered in relation to this recommendation.

3. Proposal: FMCS educators need to observe procedures in the "monitor" category.

Three procedures were classified as borderline cases because of their close relationship to either the "continue" or "modify" category: they were grouped into a third category, the "monitor" category. FMCS educators should observe the procedures in this category and reconsider each when a plan of action is developed for future improvements in each procedure. FMCS educators could develop a list of strategies for retailers to consider regarding the reordering of merchandise.

4. Proposal: In order for retailers to gain as much as possible from the workshop presentation, FMCS educators need to spend more time setting the climate for learning. Activities to insure a more comfortable climate for learning are included in Appendix O.

Recommendations for Expansion of FMCS. Four recommendations made to expand FMCS educational activities were as follows:

1. Proposal: FMCS should develop, conduct and advertise workshops for two distinct target audiences: workshops for the small retailer with annual sales volume below $300,000 and the large retailer with annual sales volume above $300,000. In addition, a separate workshop should be developed to benefit a third target group, the potential retail entrepreneur in the planning stages of opening an apparel store.

Of the retailers who made contact with FMCS through one-on-one consultation sessions, approximately one-third indicated that they were in the planning stages of opening apparel stores. Workshops for this group of adults could be co-sponsored by organizations such as the Small Business Administration, Chamber of Commerce, or Better Business Bureau. The workshops could be conducted in large cities and not just confined to the apparel market areas.

2. Proposal: A networking type organization for apparel retailers needs to be established and designed to act as a vehicle for a) the discussion of mutual concerns and problems, b) the exchange of comparative information and c) the mutual support of participants.

Such a networking organization would be of benefit to two groups of apparel retailers: FMCS alumni, those retailers who have attended past FMCS educational activities; and new apparel retailers

who have not attended FMCS educational activities. Groups of people with common concerns and interests could find support and encouragement in banding together. In a networking organization, FMCS educators could provide professional help in the early stages of the development of the apparel stores; later their role would be that of consultant on problem situations.

3. Proposal: A newsletter devoted to concerns and interests of retailers needs to be designed and developed for the small apparel retailer who attended FMCS educational activities.

The newsletter could focus on current happenings in the apparel retailing field and provide information on networking organizations for apparel retailers. The newsletter could contain current merchandising strategies and suggest possible solutions to recognized problems of the small apparel retailer and small business in general.

4) Proposal: FMCS should consider sponsoring short one or two-hour mini-seminars on concepts that retailers have been exposed to in previous workshops but need additional assistance, or on new concepts in which the retailers have expressed a specific need.

The brainstorming technique, for example, could be used to identify ways to increase sales and profits for the small retailer. The mini-seminars could

have experienced retailers as facilitators for each homogeneous group designation.

In conclusion, the educational activities conducted by Fashion Merchandising Consultant Services (FMCS) appeared to have positive outcomes. FMCS educators who developed and provided educational assistance for apparel retailers (adults in the workplace) did have an impact on basic retail procedures performed by participants in the workshop and consultation session and seminar activities. Retailers were performing some of the six procedures recommended during the day-long workshops; however, some of the procedures related to dollar merchandise plan were not being performed by retailers. Retailers were positively influenced by FMCS in their career roles as apparel retailers. Store size (annual sales volume), more than store age or length of contact (long contact workshop or short contact consultation session/seminar) tended to be a significant factor with respect to responses of retailers.

In summary, final recommendations for FMCS educational activities were based on findings from the Assessment Survey and concepts related to andragogy. Detailed suggestions and recommendations were proposed to improve and to expand FMCS educational activities with emphasis on FMCS workshops.

The Fashion Merchandising Consultant Services (FMCS) educational activities should be improved and expanded to provide professional assistance for adults in the workplace. The viable educational activities provided by FMCS could

help individuals learn techniques and strategies to better insure the survival and success in apparel retailing. Educational assistance such as that provided by FMCS could deter the escalation of the failure rate of apparel stores, among the highest rate of failures in the small business arena. At the same time, FMCS educators could use their expertise to meet the needs of a group of non-traditional students, adults in the workplace, namely apparel retailers.

CHAPTER V

SUMMARY AND RECOMMENDATIONS

The study assessed an ongoing university continuing educational program conducted by Fashion Merchandising Consultant Services (FMCS) for apparel retailers at the Dallas Apparel Mart, 1979-1981, and formulated recommendations for improvement and expansion of FMCS educational activities. There were three objectives of the study: 1) to assess the impact of FMCS educational activities on apparel retailers; 2) to analyze the strengths and weaknesses in FMCS educational activities; 3) to formulate recommendations to improve and expand FMCS educational activities.

Recommendations evolved from a systematic investigation of strengths and weaknesses of the FMCS educational activities. The review of literature that supported the study included the following areas: the unique concerns of the small business entrepreneur with special attention given to the apparel retailer, the need and availability of educational assistance for entrepreneurs, and the significance of assessment of educational activities for the adult learner who is interested in immediate application of learning to current concerns.

Summary of Procedures

Four procedural stages related to the objectives of the study were developed. The stages were the following: 1) development of the Assessment Survey; 2) assessment of the impact of FMCS; 3) analysis of the strengths and weaknesses in FMCS; and 4) formulation of recommendations to improve and to expand FMCS educational activities.

From 1979-1981, 762 retailers attended one or more of the 11 FMCS educational activities at the Dallas Apparel Mart. These activities consisted of three all-day workshops, six one-on-one consultation sessions held during three-day market, and two hour-long seminars. The educational activities were developed primarily for apparel retailers in business less than five years and with annual sales volume under $500,000.

Demographic data and evaluative data collected from participants attending three workshops along with data from two four-month Follow-up Surveys were analyzed in order to design an assessment instrument. The sample for the assessment study consisted of 460 stores selected from the participants of 11 FMCS educational activities held at the Dallas Apparel Mart, 1979-1981. The sample was divided into two groups: 156 retail stores participating in FMCS day-long workshops (long contacts) and 304 retail stores participating in short consultation sessions and/or hour-long seminars (short contacts).

Two forms of the Assessment Survey were designed:

1) a long form sent to retailers who participated in long contact activities and 2) a short form sent to retailers who participated in short contact activities. Reliability and validity for the survey were established using test/ retest methods and panels of authorities.

Data were collected using a mailed self-administered survey designed in booklet form. Follow-up activities by mail and phone were conducted. The response rate for 156 surveys sent to long contact participants was 33 percent and for 304 surveys sent to short contact participants was nine percent. The total response rate for 460 surveys sent was 17 percent yeilding 51 usable surveys from long contact participants and 21 usable surveys from short contact participants.

Data were compiled on floppy disks for use on a Texas Instruments Professional Microcomputer. Frequencies and percentages were compiled for the total responses. Criteria were established to identify strengths and weaknesses in the FMCS educational activities. Chi-square analysis was used to identify significant relationships between 1) responses of retailers and store age, 2) responses of retailers and annual sales volume, 3) responses of retailers to selected pairs of statements, 4) responses of retailers and length of contact. Designated procedures were used to formulate suggestions and develop the final recommendations for improving and expanding the FMCS educational activities.

Summary of Findings

Forty-one percent of the long contact respondents and 70 percent of the short contact respondents indicated their stores had been in operation five years or less; 55 percent of the long contact respondents reported annual sales volume between $100,001 and $300,000; three-fourths of the short contact respondents indicated annual sales volume below $300,000. Of the long contact respondents, a total of 89 percent indicated they were store owners while 87 percent of the short contact respondents were owners.

Procedures suggested by FMCS during the day-long workshops were being performed by the majority of the retailers. The following procedures tended to be performed by retailers all or most of the time: 8 out of 10 physical inventory control procedures, 4 out of 6 manufacturers' performance procedures, all of the 3 open-to-buy plan procedures and all of the 2 market open-to-buy procedures were performed by 70 percent or more of the retailers all or most of the time. The following procedures tended not to be performed by retailers all or most of the time: 7 out of 18 perpetual inventory control procedures and 7 out of 12 dollar merchandise plan procedures were performed some or none of the time by 30 percent or more of the retailers.

No or slight difficulty was reported by retailers in the areas of physical inventory control, manufacturers' performance and market open-to-buy. Moderate or serious

difficulty was reported by retailers in the areas of perpetual inventory control, dollar merchandise plan and open-to-buy plan.

Data from both long and short contacts were combined for statements related to FMCS influence on retailers since there were no statistically significant differences between their responses. Fifty-one percent or more of the retailers indicated that 1) FMCS had great or some influence on their performance of six retail procedures related to the six procedural concepts; 2) they received professional help from FMCS; and 3) they noticed positive changes in attitudes toward their role as apparel retailers since attending FMCS educational activities.

Strengths and Weaknesses

Thirty-three of the 51 procedures related to six procedural concepts were performed all or most of the time by 70 percent or more of the retailers. Findings indicated that FMCS had great or some influence on 50 percent or more of the retailers in regard to the performance of all six procedures. Seventy-five percent or more of all retailers indicated that help was received from FMCS educators. Ninety-one percent indicated that FMCS had helped them to become aware of ways to improve their retailing skills. Weaknesses in the educational activities tended to be more apparent in two procedural concepts. Retailers indicated performing only some or none of the time 14 out of 30 pro-

cedures related to perpetual inventory control and dollar merchandise plan. Retailers indicated that 12 out of 21 procedures were performed with no or only slight difficulty. Three physical inventory control procedures, two manufacturers' performance procedures and two market open-to-buy procedures were performed by 70 percent or more of the retailers with no or only slight difficulty. Of the four perpetual inventory control procedures, two were performed with no or only slight difficulty by 70 percent or more of the retailers and two were performed with moderate or serious difficulty by 30 percent or more of the retailers; moderate or serious difficulty was encountered with five of the seven dollar merchandise plan procedures and two of the three open-to-buy plan procedures.

Chi-square analysis indicated that there were no statistically significant relationships between length of contact or age of store and responses from retailers. There were nine significant relationships at the .05 level between annual sales volume and responses of retailers. Five of the nine relationships related to perpetual inventory control procedures which were performed by retailers from small stores (annual sales volume under $300,000) more than large stores (annual sales volume over $300,000). These findings indicated that the needs of retailers of small stores are different than the needs of large stores.

Chi square analysis was performed on responses to selected pairs of statements, and six pairs of statements

were statistically significant at the .05 level. Four relationships suggested that when retailers performed an activity all or most of the time, they tended to encounter no or slight difficulty.

Suggestions to continue, to modify or to monitor procedures were formulated in order to propose ways to improve and to expand FMCS educational activities. The continue category included 23 suggestions, the modify category 15 suggestions and the monitor only 3 suggestions. The three monitor procedures were on the borderline between continue and modify; FMCS educators need to observe these procedures and make decisions about them at a later time.

Recommendations based on the findings from the Assessment Survey and the concepts of andragogy were made to improve and to expand FMCS educational activities. FMCS educators need to 1) modify or monitor certain retail procedures presented during the workshops; 2) design and conduct workshops for small retailers, large retailers and retailers-to-be; 3) implement activities for setting a more comfortable climate for adult learning during the all-day workshops; 4) establish a networking organization for retailers; 5) publish a newsletter for retailers; and 6) coordinate mini-conferences for retailers with specific needs.

In conclusion, the purposes of the study were achieved through development of an Assessment Survey and analysis of responses from retailers who participanted in FMCS

educational activities over a period of three years. The study provided a vehicle to systematically investigate the strengths and weaknesses in FMCS educational activities and to propose recommendations to improve and to expand these activities in order to serve apparel retailers.

Recommendations for Future Study

On the basis of the findings of this study, the following recommendations for future study were proposed by the researcher:

1. Duplicate the study using a sample of a similar group of apparel retailers who have not attended FMCS educational activities and investigate the differences between small store owners (annual sales volume below $500,000) and large store owners (annual sales volume above $500,000) with regard to merchandising procedures used and recognized assistance needed.
2. Investigate the education and experience as well as preparations made by new entrepreneurs of small apparel stores and initiate yearly follow-up activities to identify concerns and problems for the first five years in business.
3. Investigate commitment of universities and colleges in meeting the needs of the small business entrepreneur through offering educational assistance in the workplace for the apparel retailer.

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APPENDIXES

APPENDIX A

PROFILE OF PARTICIPANTS ATTENDING FMCS WORKSHOPS AND CONSULTATION SESSIONS (1979-1981)

TABLE XXX

PROFILE OF PARTICIPANTS ATTENDING FMCS WORKSHOPS AND CONSULTATION SESSIONS 1979-1981

	Workshop Participants N=101	Consultation Session Participants N=255
Store Location		
Downtown	42%	37%
Mall/Shopping Center	41%	28%
Strip	7%	16%
Miscellaneous	10%	19%
Town or City Size		
Below 5,000	10%	13%
5,001-10,000	15%	13%
10,001-25,000	20%	16%
25,001-50,000	15%	17%
50.001-75,000	10%	11%
75.001-100,000	7%	7%
Over 100,000	23%	23%
Store Age		
Plan to open store	0%	33%
Less than 1 year	27%	28%
1-2 years	18%	13%
3-4 years	17%	8%
5-10 years	17%	10%
More than 10 years	21%	8%
Annual Sales Volume		
$100,000 or less	39%	50%
$100,001-$300,000	48%	36%
$300,001-$500,000	7%	8%
$500,001 or more	6%	6%
Number of Full-Time Employees*		
No employees	21%	25%
1 employee	30%	26%
2 employees	19%	30%
3 employees	12%	5%
More than 3 employees	17%	14%

*Excluding owner(s)
Note: Not all participants answered each question about demographic information.

APPENDIX B

RESPONSES TO REACTION EVALUATION

TABLE XXXI

STRONGLY AGREE OR AGREE RESPONSES ON REACTION EVALUATION FROM FMCS PARTICIPANTS WHO INDICATED THAT CONCEPTS PRESENTED DURING WORKSHOPS WERE HELPFUL

	Total Responses	Strongly Agree or Agree	
Concepts Presented N = 199	N	N	%
Perpetual Inventory Methods	194	184	95
Physical Inventory Methods	196	186	95
Merchandise Classification Percentages[a]	192	180	94
Resource Evaluation[b]	189	181	96
Dollar Merchandise Plan	193	186	96
Open-to-buy Plan	194	191	98
Market Plan	195	192	98

[a]Six procedural concepts were referred to throughout the study; the concept of merchandise classification percentages is a part of physical inventory methods.

[b]Resource Evaluation is referred to as manufacturers' performance throughout the study.

APPENDIX C

RESPONSES TO FOLLOW-UP SURVEY

TABLE XXXII

"YES" ANSWERS TO QUESTIONS ON FOLLOW-UP SURVEY RELATED TO CONCEPTS PRESENTED IN 1980-1981 WORKSHOPS

Code	FUS Question N=48	Total Responses N	"Yes" N	"Yes" %
S	Prior to attending workshop, were you satisfied with the perpetual inventory system you used?	45	21	47
C	Have you made any changes in your perpetual inventory system since attending the workshop?	46	26	57
P	Have you changed the information on your price ticket since the workshop?	47	16	34
P	Are you recording the following kinds of information on your purchase order:			
	merchandise received and sold?	46	34	74
	markdowns and returns?	44	29	66
S	Prior to attending workshop, were you satisfied with the physical inventory system you used?	45	23	51
C	Have you made any changes in your pysical inventory control system since attending the workshop?	46	20	43
P	Are you presently using the visual (eyeballing) method of checking stock in any merchandise classification?	47	39	83
P	Are you presently keeping records of stock counts in any merchandise classifications?	46	29	63
P	Have you estimated the percentage of merchandise in each classification or category?	47	20	43

TABLE XXXII (Continued)

Code	FUS Question N=48	Total Responses N	"Yes" N	"Yes" %
S	Prior to attending workshop, were you satisfied with your method of analyz- manufacturer performance records?	46	10	22
C	Have you made any changes in your method of analyzing manufacturer performance records since attending the workshop?	45	32	71
P	Are you able to analyze the following kinds of information from your purchase order:			
	slow sellers?	46	35	76
	stock shortages?	47	32	68
	runner?	41	32	78
P	Are you able to analyze performance of resources from information on the purchase order based on:			
	markdowns?	46	29	63
	returns?	44	30	68
	sales?	45	34	76
S	Prior to attending workshop, were you satisfied with your system of planning OTB?	46	8	17
C	Have you made any changes in the method of planning your OTB since attending the work shop?	48	34	71
P	Are you planning sales for a specific period?	47	40	85
P	Are you planning stock in dollars?	47	38	81
P	Are you planning EOM stock?	44	16	36
P	Are you planning markdowns for a specific period?	47	27	57
P	Are you planning retail purchases for a specific period?	46	42	91

TABLE XXXII (Continued)

Code	FUS Question N=48	Total Responses N	"Yes" N	"Yes" %
P	Are you calculating OTB at cost?	48	41	85
P	Are you allowing for previous commitments in planning cost dollars OTB?	47	43	91
S	Prior to attending workshop, were you satisfied with your planning of OTB purchases in percentages and dollars by classifications and resources?	47	8	17
C	Have you made any changes in your planning of OTB purchases in percentage and dollars by classification and resources since attending workshop?	47	33	70
P	Do you calculate the percentage and dollar OTB according to major classifications?	47	35	74
P	Do you allocate the percentage and dollar OTB according to major resource performance?	47	32	68

Code
S Statements concerned with retailers satisfaction with procedures used prior to attending workshops.
C Statements concerned with changes made after attending workshops.
P Statements concerned with specific procedures currently performed by retailers.

APPENDIX D

TERMINAL AND PERFORMANCE OBJECTIVES OF FMCS WORKSHOPS

FASHION MERCHANDISING CONSULTANT SERVICES

DALLAS APPAREL MART

Workshop Session

Six Terminal Objectives and Eighteen Related Performance Objectives

1. You will be able to initiate a perpetual inventory system that will be suitable for major classifications.

   a. You will be able to complete a price ticket given the information from the purchase order.

   b. You will be able to record on the purchase order merchandise received and sold.

   c. You will be able to record on the purchase order merchandise marked down and returned.

2. You will be able to identify physical inventory control systems which are appropriate for certain merchandise classifications according to percentages.

   a. You will be able to apply visual inventory control to some merchandise classifications.

   b. You will be able to apply the physical count method for inventory purposes.

   c. You will be able to summarize the breakdown of the inventory into classifications by percentage.

3. You will be able to analyze the performance records of the manufacturer.

   a. You will be able to analyze stock shortages, slow sellers and runners from the inventory information recorded on the purchase order.

   b. You will be able to evaluate the performance of resources based on markdowns, returns and sales.

4. You will be able to complete the dollar merchandise plan.

a. You will be able to plan sales for a specific period.

b. You will be able to estimate the beginning-of-the-month (BOM) stock needed to support planned monthly sales.

c. You will be able to project the end-of-month (EOM) stock.

d. You will be able to plan markdowns for a specific period.

e. You will be able to plan retail purchases for a specific period.

5. You will be able to calculate an open-to-buy (OTB) budget for a seasonal period.

a. You will be able to calculate planned purchases at cost.

b. You will be able to determine the cost dollar value of total commitments.

c. You will be able to calculate an OTB at cost.

6. You will be able to plan the percent and dollar amounts of planned OTB purchases by classifications and resources.

a. You will be able to calculate dollars OTB by major classifications.

b. You will be able to allocate the percent and dollars OTB according to major resource performance.

APPENDIX E

RELIABILITY AND VALIDITY OF ASSESSMENT SURVEY

Procedural Steps for Establishing Reliability

The following procedural steps were identified and performed by the researcher.

1. Identify retailers to make up test/retest sample. The criteria established were as follows: small apparel retailer, recent participant of FMCS day-long workshop, participants of a workshop held outside the Dallas area.

2. Obtain a complete list of retailers who attended the spring 1982 FMCS workshop held in Minneapolis. This workshop was the only FMCS workshop that had been held outside the Dallas Apparel Mart at the time of the investigation.

3. Select every third name of stores/retailers from the list of 68 who attended the Minneapolis workshop. Every third name on the list was circled to indicate a potential participant in test/retest.

4. Telephone 22 retailers to ask for help and cooperation with the test/retest portion of the assessment of FMCS educational activities. Indicate the need to complete and return the survey twice about two weeks apart. Positive reactions were received from 14 retailers. The other eight retailers were not sent surveys because of various reasons, such as: attempts to reach five retailers were not successful, one retailer was sick, one retailer was on vacation, one retailer was going out of business.

5. Mail 14 surveys with cover letters the week of July 26, 1982 and send follow-up letters or make phone calls

to the non-respondents for each of the two mailings of the survey. The completed sets of test/retest should number at least ten.

6. Mail the retests the week of August 9 to retailers who returned the first surveys; continue to contact retailers who have not returned the surveys. Send retest after each test is received.

7. Calculate the consistency reliability coefficient (Aiken, 1980, p. 959) for each of the 119 statements in the survey excluding the 13 "other, please specify" open-ended statements.

8. Review and modify or delete directions and statements in the survey based on the coefficients of each statement.

Fourteen retailers indicated they would participate in the test/retest research procedure. The surveys were sent on July 15 with a return date of August 1. Letters were sent and follow-up phone calls were made in August to retailers who had not returned their surveys. The retests were sent between August 1 and 15 since several surveys were received by the researcher after August 1. Follow-up calls were made to retailers who had not returned the retests by August 23. By September 1, ten test/retests were received.

TABLE XXXIII

RELIABILITY COEFFICIENTS FOR RESPONSES TO TEST-RETEST OF THE ASSESSMENT SURVEY

Statement	No. of Pairs	Reliability Coeff.	Statement	No. of Pairs	Reliability Coeff.
Part I[a]			13.	10	.867**
1.	10	.967**	14. a.	10	.833**
2. a.	8	.833*	b.	10	.867**
b.	10	.800*	15. a.	10	.933**
c.	10	.867**	b.	10	.767*
d.	10	.900**	c.	9	.741
e.	10	.767*	16.	10	.867**
f.	9	.889**	17.	10	.900**
g.	10	1.000**	18.	10	.733
3.	9	.852**	19.	10	.767*
4. a.	10	.967**	20.	10	.800*
b.	10	.967**	21.	10	.800*
c.	10	.967**	Part II.[b]		
d.	10	.833**	1.	10	1.000**
e.	10	.833**	2.	10	.900*
5. a.	9	.889**	3.	10	.700
b.	9	.852**	4.	10	.800
c.	9	.815*	5.	10	.700
d.	9	.926**	6.	10	.800
6. a.	10	.933**	7.	10	.600
b.	10	.867**	8.	10	.700
c.	10	.833**	9.	10	.900*
7. a.	9	.926**	Part III.[a]		
b.	9	.963**	1.	10	.933**
8.	9	.889**	2.	10	.767*
9. a.	10	.900**	3.	10	.700
b.	10	.767*	4.	10	.733
c.	9	.852**	5.	10	.933**
d.	8	.667	6.	10	.900**
10. a.	10	.900**	7.	10	.800*
b.	10	.900**	8.	10	.733
c.	10	.833**	9.	10	.833**
d.	9	.926**	10.	10	.900**
e.	10	.800*	11.	10	.767*
f.	10	.900**	12.	9	.741
11. a.	10	.833**	13.	10	.767*
b.	10	.767*	14.	10	.833**
c.	10	.833**	15.	10	.800*
d.	10	.800*	16.	10	.833**
12. a.	8	.958**	17.	10	.833**
b.	10	.900**	18.	10	.767*

TABLE XXXIII (Continued)

Statement	No. of Pairs	Reliability Coeff.	Statement	No. of Pairs	Reliability Coeff.
19.	10	.800*	4.	9	.778
20.	10	.800*	5.	10	1.000**
21.	10	.800*	6.	10	.900*
Part IV[a]			Part VII[a]		
1.	10	.833**	1.	10	.767*
2.	10	.700	2.	10	.767*
3.	10	.733	3.	10	.733
4.	10	.667	4.	10	.867**
5.	10	.833**	5.	10	.833**
6.	10	.867**	6.	10	.700
Part V[b]			7.	10	.667
1.	10	1.000**	8.	10	.857**
2.	10	.500	9.	10	.833**
3.	10	.800	10.	10	.800*
4.	10	.900*	11.	10	.633
5.	10	.900*	12.	10	.733
6.	10	.800	13.	10	.800*
7.	10	.900*	14.	10	.800*
8.	9	.889*	15.	7	.857*
9.	10	.900*	16.	10	.667
10.	10	.800	17.	10	.800*
Part VI[b]			18.	10	.800*
1.	9	.889*	19.	10	.900**
2.	10	1.000**	20.	10	.833**
3.	8	.875*	21.	10	.900**

[a]Four categories of responses
[b]Two categories of responses
*Statistically significant at the .05 level
**Statistically significant at the .01 level

Procedural Steps to Establish Validity

Each group of authorities reviewed the survey for clarity, content and format in order to make suggestions for improvements. Copies of the survey were either hand delivered or mailed to the authorities the week of July 26, 1982. Individually typed cover letters were sent with the survey to each reviewer. Each letter explained to the reviewer the reasons why he/she was selected to review the survey; information about a follow-up contact with the researcher was also included. The survey was distributed to the following groups of people:

The first group of authorities consisted of five consultants from Oklahoma State University. An appointment was made with each reviewer so that suggestions could be given verbally to the researcher.

The second group of authorities consisted of a panel of six former retailers and current professional educators. The researcher acted as panel leader and each section of the survey was discussed in sequence and in depth. Suggestions verbally discussed were also included in many written suggestions the panel of experts gave to the researcher.

The third group of reviewers consisted of nine experienced apparel retailers associated with the development and presentation of FMCS workshops at the Dallas Apparel Mart. These retailers, known as Retail Apparel Guides, were from Oklahoma, Louisiana, Arkansas and Texas.

Changes Made in the Assessment Survey

In Part I, Current Store Procedures, three of the 51 statements received reliability coefficients below the .75 level. Additional information was included in the directions. Changes related to the four-option response scale were made. For example, another descriptive term was used for each of the four options--"always" was added to "all of the time"; the options for percentage of time were changed to include a range such as "100-90 percent of the time" and not "100 percent of the time."

In Part II, Use of Recommended Store Procedures, of the eight statements, four received reliability coefficients below the .80 level. Directions were modified and additional statements were included in order to improve Part II. Two statements were completely deleted; of those two statements, one had received .70 reliability coefficient.

In Part III, Degree of Difficulty of Store Procedures, of the 21 statements, four four-option response statements received reliability coefficients below the .75 level. The rating scale was changed in two ways: 1) the noun "problem" was changed to "difficulty": 2) the negative-to-positive format ("major problem" to "no problem") was changed to the positive-to-negative format used in Part I (example: "no difficulty" to "serious difficulty"). The descriptive adjective "major" was changed to "serious." Two descriptive adjectives were added to indicate levels 2 and 3--"slight" and "moderate" difficulty.

In Part IV, Degree of FMCS Influence on Store Procedures, of the six statements, three four-option response statements received reliability coefficients below the level of .75. Directions were modified and the word "degree" was printed in bold face. The words "regularly" or "routinely" were deleted from the six statements. Two descriptive adjectives, "some influence" and "little influence" were added to levels 2 and 3.

In Part V, Professional Help Received from FMCS, of the six statements, one two-option response statement received a reliability coefficient below the level of .80. The statement was deleted from the survey. The directions were modified.

In Part VI, Changes in Attitude about Role as Apparel Retailer, of the ten two-option response statements, one statement received a reliability coefficient below the level of .80. Directions were refined; the phrase "more positive" was printed in bold face.

In Part VII, Future Help Needed in Apparel Retailing, of the 21 statements, six four-option response statements received reliability coefficients below the .75 level. Three statements were deleted from the survey; two statements were modified. The scale used was reversed to conform to the positive-negative format used in Part I. "No help needed" was used for scale 1 instead of "help greatly needed"; two descriptive adjectives were added to indicate scale 2 and 3--"little help needed" and "some help needed."

APPENDIX F

LONG AND SHORT FORMS OF ASSESSMENT SURVEY

TO BECOME A CHARTER MEMBER OF
CAMM AND RECEIVE A
6-month *FREE CAMM* membership
2 CAMM Newsletters
1 CAMM Research Report
RETURN THIS BOOKLET BY
NOVEMBER 30, 1982

RETURN POSTAGE GUARANTEED

CENTER FOR APPAREL MARKETING
AND MERCHANDISING
OSU EXTENSION
306 Home Economics West
Stillwater, Oklahoma 74078

2630

LONG FORM OF ASSESSMENT SURVEY

Oklahoma State University

CENTER FOR APPAREL MARKETING & MERCHANDISING

November 3, 1982

Dear FMCS Participant,

We are conducting an evaluation of our 1979-1981 Fashion Merchandising Consultant Services held in Dallas at the Apparel Mart. We are asking you, as one of our workshop participants, to complete the enclosed booklet. We expect that it will take about 20 minutes of your time. Through your responses, we hope to improve our services to you.

The Fashion Merchandising Consultant Services (FMCS) is now a part of the Center for Apparel Marketing and Merchandising (CAMM). You can become a Charter Member of CAMM by completing the self-addressed stamped booklet and returning it to Oklahoma State University by November 30, 1982. You will receive a FREE 6-month CAMM membership, two CAMM Newsletters and one CAMM Research Report.

Your responses will be kept confidential. A code is used to indicate the type and date of the workshop in which you participated and to keep a record of the number of responses. Your responses are important to us. We appreciate your willingness to help us improve our services to apparel retailers.

Sincerely,

Maureen W. Brooks

Kathryn M. Greenwood

Maureen W. Brooks
Graduate Assistant

Kathryn M. Greenwood
CAMM Director

EVALUATION OF FASHION MERCHANDISING CONSULTANT SERVICES

Dallas Apparel Mart 1979 — 1981

PART I CURRENT STORE PROCEDURES

Described below are a number of store procedures recommended to workshop participants by Fashion Merchandising Consultant Services (FMCS). Please circle the number that indicates the procedures you are using according to the scale below.

1. All of the time, always; 100-90% of the time
2. Most of the time, usually; 89-51% of the time
3. Some of the time, sometimes; 50-11% of the time
4. None of the time, never; 10-0% of the time

FMCS realizes that some of the procedures recommended are not applicable to all retail situations. FMCS is interested in learning what procedures **YOU** are doing in your store.

	ALL OF THE TIME			NONE OF THE TIME
1. I use purchase orders (logs, journals, invoices) to obtain merchandise information for use on price tickets.	1	2	3	4
2. I include the following kinds of information on price tickets:				
a. date received	1	2	3	4
b. manufacturer's code number	1	2	3	4
c. coded cost (wholesale) price	1	2	3	4
d. style number	1	2	3	4
e. garment size	1	2	3	4
f. color	1	2	3	4
g. retail price	1	2	3	4
h. other (please specify) _____	1	2	3	4
3. I keep price ticket stubs to record information about merchandise received and sold.	1	2	3	4
4. I record the following kinds of information on my purchase orders (logs, journals, invoices):				
a. merchandise received	1	2	3	4
b. merchandise sold	1	2	3	4
c. merchandise marked down	1	2	3	4
d. merchandise returned by customer	1	2	3	4
e. merchandise returned to manufacturer	1	2	3	4
f. other (please specify) _____	1	2	3	4
5. I record merchandise information for the following reasons:				
a. make decisions about reordering	1	2	3	4
b. watch progress of slow/fast sellers	1	2	3	4
c. evaluate manufacturers' performance	1	2	3	4
d. determine stock shortages	1	2	3	4
e. other (please specify) _____	1	2	3	4

	ALL OF THE TIME			NONE OF THE TIME
6. I use eyeballing (visual control method) to determine current stock levels in the following kinds of merchandise:				
a. one of a kind	1	2	3	4
b. new fashions, not stocked in depth	1	2	3	4
c. merchandise kept in open view	1	2	3	4
d. other (please specify) _____	1	2	3	4
7. I take stock counts at regular intervals for the following kinds of merchandise:				
a. staple or basic merchandise	1	2	3	4
b. hosiery	1	2	3	4
c. other (please specify) _____	1	2	3	4
8. I estimate for each major merchandise classification, the % of the total inventory.	1	2	3	4
9. I use stock count information for the following purposes:				
a. make decisions about reordering	1	2	3	4
b. watch progress of slow/fast sellers	1	2	3	4
c. determine stock shortages	1	2	3	4
d. comply with IRS requirements	1	2	3	4
e. other (please specify) _____	1	2	3	4
10. I use the following kinds of information to periodically evaluate manufacturers' performance:				
a. sales at full retail price	1	2	3	4
b. markdowns	1	2	3	4
c. returns	1	2	3	4
d. reorders	1	2	3	4
e. terms of payment	1	2	3	4
f. co-op advertising	1	2	3	4
g. other (please specify) _____	1	2	3	4
11. I estimate planned sales for a specific period by:				
a. checking sales volume for same period last year	1	2	3	4
b. considering promotional events planned	1	2	3	4
c. estimating the % of sales increase/ decrease over last year	1	2	3	4
d. distributing the rate of sales increase/ decrease by the month	1	2	3	4
e. other (please specify) _____	1	2	3	4
12. I estimate stock level needed to support planned monthly sales based on:				
a. stock-to-sales ratio based on my own figures	1	2	3	4
b. stock-to-sales ratio based on national figures	1	2	3	4
c. other (please specify) _____	1	2	3	4

	ALL OF THE TIME			NONE OF THE TIME
13. I use past records of markdowns to determine planned markdowns for a given period.	1	2	3	4
14. I estimate planned markdown % according to the following:				
a. planned store promotions	1	2	3	4
b. planned store clearances	1	2	3	4
c. other (please specify) _____	1	2	3	4
15. I calculate retail dollar amount of merchandise for a given period by using the following:				
a. planned sales volume	1	2	3	4
b. beginning of the month figures	1	2	3	4
c. markdown goals	1	2	3	4
d. other (please specify) _____	1	2	3	4
16. I calculate open-to-buy (OTB) at cost for the purchase of new merchandise each season.	1	2	3	4
17. I arrive at retail prices by doubling (keystone method) the wholesale price.	1	2	3	4
18. I consider merchandise already purchased for delivery during a specific period (purchase commitments) before I calculate OTB plans.	1	2	3	4
19. I calculate OTB for each major merchandise classification.	1	2	3	4
20. I allocate OTB based on performance ratings of major manufacturers in each classification.	1	2	3	4

PART II USE OF RECOMMENDED STORE PROCEDURES

Indicate by mark (x), the most appropriate statement for your store situation.

_____ 1. I did not plan any changes in store procedures after attending FMCS workshop.

_____ 2. I received positive reinforcement that the store procedures I was using should be continued.

_____ 3. I planned some changes in store procedures after attending FMCS workshop but **DID NOT** make any changes because of the following reasons. Check as many statements as appropriate for your store

- _____ a. Lack of time to try suggested procedure(s).
- _____ b. Lack of money to try suggested procedure(s).
- _____ c. Lack of physical store space.
- _____ d. Lack of ability to utilize suggestions.
- _____ e. Lack of competent employees to make changes in store procedure(s).
- _____ f. Lack of confidence in ability to make successful transition from old method(s) to new suggested method(s).
- _____ g. Other (please specify) _____

PART III DEGREE OF DIFFICULTY WITH STORE PROCEDURES

Indicate the degree of difficulty you have encountered in each of the following procedures recommended by FMCS. Circle the appropriate number using the scale below.

1. No difficulty
2. Slight difficulty
3. Moderate difficulty
4. Serious difficulty

	NO DIFFICULTY			SERIOUS DIFFICULTY
1. Gathering merchandise information to include on price tickets.	1	2	3	4
2. Recording information on merchandise received and sold.	1	2	3	4
3. Recording information on merchandise marked down.	1	2	3	4
4. Recording information on merchandise returned by the customer or merchandise returned to the manufacturer.	1	2	3	4
5. Counting stock by eyeballing (visual control method).	1	2	3	4
6. Regularly counting stock using the stock count method.	1	2	3	4
7. Estimating the % of major classifications of merchandise.	1	2	3	4
8. Knowing when to reorder merchandise.	1	1	3	4
9. Evaluating manufacturer's performance.	1	2	3	4
10. Maintaining adequate past sale records.	1	2	3	4
11. Estimating the % of sales increase/decrease over last year's sales volume.	1	2	3	4
12. Estimating consumer demand for merchandise in future seasons.	1	2	3	4
13. Determining desirable stock-to-sales ratio.	1	2	3	4
14. Maintaining adequate past markdown records.	1	2	3	4
15. Establishing markdown policy for merchandise.	1	2	3	4
16. Keeping stock/sales in balance for a specific period.	1	2	3	4
17. Judging what customer is willing to pay for merchandise.	1	2	3	4
18. Planning merchandise delivery dates.	1	2	3	4
19. Calculating commitments for a given period.	1	2	3	4
20. Making fashion judgments appropriate for store image and target customers.	1	2	3	4
21. Finding time to visit potential resources (manufacturers) at market.	1	2	3	4

PART IV DEGREE OF FMCS INFLUENCE ON STORE PROCEDURES

Store procedures recommended by FMCS are described below. Please circle the number that indicates the **DEGREE** to which you were influenced by Fashion Merchandising Consultant Services (FMCS) in terms of the following procedures. Use the scale below.

1. Great influence
2. Some influence
3. Little influence
4. No influence

FMCS INFLUENCED ME TO:	GREAT INFLUENCE			NO INFLUENCE
1. Record information on merchandise received and sold.	1	2	3	4
2. Take stock counts to control inventory for basic stock.	1	2	3	4
3. Evaluate the performance of major manufacturers.	1	2	3	4
4. Make seasonal dollar merchandise plans.	1	2	3	4
5. Project seasonal open-to-buy by cost (wholesale).	1	2	3	4
6. Distribute open-to-buy among major manufacturers.	1	2	3	4

PART V PROFESSIONAL HELP RECEIVED FROM FMCS

Indicate by circling **YES** or **NO**, your reactions to the following statements.

FMCS HELPED ME TO:		
1. Build confidence in my ability to make changes in store procedures.	Yes	No
2. Organize routine procedures.	Yes	No
3. Analyze manufacturers' performance.	Yes	No
4. Meet and interact with other apparel retailers and discuss common problems and opportunities.	Yes	No
5. Become aware of ways to improve my retailing skills.	Yes	No

Comments:

_____

_____

_____

_____

PART VI CHANGES IN ATTITUDES ABOUT ROLE AS APPAREL RETAILER

Indicate by circling **YES** or **NO** whether you have noticed any **POSITIVE** change(s) in your role as apparel retailer since you attended Fashion Merchandising Consultant Services workshop.

SINCE ATTENDING FMCS WORKSHOP, I HAVE A **MORE POSITIVE** ATTITUDE TOWARD:

1. Analyzing merchandise records before making buying decisions.	Yes	No
2. Taking stock counts.	Yes	No
3. Identifying manufacturers with good track records.	Yes	No
4. Making seasonal dollar merchandise plans.	Yes	No
5. Using projected sales and inventory needs to plan dollar open-to-buy.	Yes	No
6. Distributing open-to-buy according to merchandise classification.	Yes	No
7. Dealing with buying and merchandising decisons and responsibilities.	Yes	No
8. Apparel retailing as a financially rewarding career.	Yes	No
9. My job as a creatively satisfying and personally rewarding career.	Yes	No
10. Suggestions from professional retail consultants.	Yes	No

Comments:

_____

_____

_____

_____

PART VII FUTURE HELP NEEDED IN APPAREL RETAILING

Indicate the degree of future help needed in apparel retailing by circling the appropriate number. Use the scale below.

1. No help needed
2. Little help needed
3. Some help needed
4. Great help needed

I NEED HELP IN LEARNING WAYS TO:	NO HELP NEEDED			GREAT HELP NEEDED
1. Improve cash flow.	1	2	3	4
2. Decrease overhead cost.	1	2	3	4
3. Deal with credit.	1	2	3	4
4. Understand terms used by manufacturers.	1	2	3	4
5. Improve relations with manufacturers.	1	2	3	4
6. Improve merchandise assortment.	1	2	3	4

	NO HELP NEEDED			GREAT HELP NEEDED
7. Dispose of slow selling merchandise.	1	2	3	4
8. Improve turnover.	1	2	3	4
9. Select new merchandise lines.	1	2	3	4
10. Benefit from computer use.	1	2	3	4
11. Increase sales per square foot.	1	2	3	4
12. Improve customer loyalty.	1	2	3	4
13. Deal effectively with personnel.	1	2	3	4
14. Increase store traffic.	1	2	3	4
15. Improve store image.	1	2	3	4
16. Improve interior and exterior displays.	1	2	3	4
17. Improve advertising and promotion.	1	2	3	4

18. Other (please specify) _____

Please provide the following information:

Mark (x) one or more of the following titles which most nearly describe your position in the store.

_____ a. owner
_____ b. manager
_____ c. buyer
_____ d. salesperson
_____ e. other (please specify)
_____

How long has store been in operation? _____

How long have you been associated with store? _____

Approximate size of store in terms of annual sales volume. Please mark (x).

Annual Sales Volume:

_____ Below $100,000
_____ $100,001 - $300,000
_____ $300,001 - $500,000
_____ $500,001 - $1,000,000
_____ $1,000,001 and over

To make sure you get your FREE 6-month CAMM membership, please leave your address label on booklet and make any necessary corrections.

THANK YOU FOR YOUR HELP!

FOLD HERE AND STAPLE AT THE BOTTOM TO RETURN

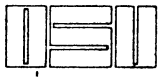
Dr. Kathryn M. Greenwood
CENTER FOR APPAREL MARKETING
AND MERCHANDISING
OKLAHOMA STATE UNIVERSITY EXTENSION
306 Home Economics West
Stillwater, Oklahoma 74078

TO BECOME A CHARTER MEMBER OF CAMM AND RECEIVE A 6-month *FREE CAMM* membership
2 CAMM Newsletters
1 CAMM Research Report
RETURN THIS BOOKLET BY *NOVEMBER 30, 1982*

RETURN POSTAGE GUARANTEED
CENTER FOR APPAREL MARKETING
AND MERCHANDISING
OSU EXTENSION
306 Home Economics West
Stillwater, Oklahoma 74078

2630

SHORT FORM OF ASSESSMENT SURVEY



Oklahoma State University

CENTER FOR APPAREL MARKETING & MERCHANDISING

November 3, 1982

Dear FMCS Participant,

We are conducting an evaluation of our 1979-1981 Fashion Merchandising Consultant Services held in Dallas at the Apparel Mart. We are asking you, as one of our participants, to complete the enclosed booklet. We expect that it will take about 10 minutes of your time. Through your responses, we hope to improve our services to you.

The Fashion Merchandising Consultant Services (FMCS) is now a part of the Center for Apparel Marketing and Merchandising (CAMM). You can become a Charter Member of CAMM by completing the self-addressed stamped booklet and returning it to Oklahoma State University by November 30, 1982. You will receive a FREE 6-month CAMM membership, two CAMM Newsletters and one CAMM Research Report.

Your responses will be kept confidential. A code is used to indicate the type and date of the activity(ies) in which you participated and to keep a record of the number of responses. Your responses are important to us. We appreciate your willingness to help us improve our services to apparel retailers.

Sincerely,

Maureen W. Brooks

Kathryn M. Greenwood

Maureen W. Brooks
Graduate Assistant

Kathryn M. Greenwood
CAMM Director

EVALUATION OF FASHION MERCHANDISING CONSULTANT SERVICES
Dallas Apparel Mart, 1979 — 1981

PART I DEGREE OF FMCS INFLUENCE ON STORE PROCEDURES

Store procedures recommended by Fashion Merchandising Consultant Services (FMCS) are described below. Please circle the number that indicates the **DEGREE** to which you were influenced by FMCS in terms of the following procedures. Use the scale below.

1. Great Influence
2. Some Influence
3. Little Influence
4. No Influence

FMCS INFLUENCED ME TO:	GREAT INFLUENCE			NO INFLUENCE
1. Record information on merchandise received and sold.	1	2	3	4
2. Take stock counts to control inventory for basic stock.	1	2	3	4
3. Evaluate the performance of major manufacturers.	1	2	3	4
4. Make seasonal dollar merchandise plans.	1	2	3	4
5. Project seasonal open-to-buy by cost (wholesale).	1	2	3	4
6. Distribute open-to-buy among major manufacturers.	1	2	3	4

PART II USE OF RECOMMENDED STORE PROCEDURES

Indicate by mark (x), the most appropriate statement for your store situation.

_____ 1. I did not plan any changes in store procedures after attending FMCS activity(ies).

_____ 2. I received positive reinforcement that the store procedures I was using should be continued.

_____ 3. I planned some changes in store procedures after attending FMCS activity(ies) but **DID NOT** make any changes because of the following reasons. Check as many statements as appropriate for your store situation.

- _____ a. Lack of time to try suggested procedure(s).
- _____ b. Lack of money to try suggested procedure(s).
- _____ c. Lack of physical store space.
- _____ d. Lack of ability to utilize suggestions.
- _____ e. Lack of competent employees to make changes in store procedure(s).
- _____ f. Lack of confidence in ability to make successful transition from old method(s) to new suggested method(s).
- _____ g. Other (please specify) _____

PART III PROFESSIONAL HELP RECEIVED FROM FMCS

Indicate by circling **YES** or **NO**, your reactions to the following statements.

FMCS HELPED ME TO:

1. Build confidence in my ability to make changes in store procedures. Yes No
2. Organize routine procedures. Yes No
3. Analyze manufacturer's performance. Yes No
4. Meet and interact with other apparel retailers and discuss common problems and opportunities. Yes No
5. Become aware of ways to improve my retailing skills. Yes No

Comments:

_____

_____

_____

PART IV CHANGES IN ATTITUDES ABOUT ROLE AS APPAREL RETAILER

Indicate by circling **YES** or **NO** whether you have noticed any **POSITIVE** change(s) in your role as apparel retailer since you attended Fashion Merchandising Consultant Services workshop.

SINCE ATTENDING FMCS WORKSHOP, I HAVE A **MORE POSITIVE** ATTITUDE TOWARD:

1. Analyzing merchandise records before making buying decisions. Yes No
2. Taking stock counts. Yes No
3. Identifying manufacturers with good track records. Yes No
4. Making seasonal dollar merchandise plans. Yes No
5. Using projected sales and inventory needs to plan dollar open-to-buy. Yes No
6. Distributing open-to-buy according to merchandise classification. Yes No
7. Dealing with buying and merchandising decisons and responsibilities. Yes No
8. Apparel retailing as a financially rewarding career. Yes No
9. My job as a creatively satisfying and personally rewarding career. Yes No
10. Suggestions from professional retail consultants. Yes No

Comments:

_____

_____

_____

_____

PART V FUTURE HELP NEEDED IN APPAREL RETAILING

Indicate the degree of future help needed in apparel retailing by circling the appropriate number. Use the scale below.

1. No help needed
2. Little help needed
3. Some help needed
4: Great help needed

I NEED HELP IN LEARNING WAYS TO:	NO HELP NEEDED			GREAT HELP NEEDED
1. Improve cash flow.	1	2	3	4
2. Decrease overhead cost.	1	2	3	4
3. Deal with credit.	1	2	3	4
4. Understand terms used by manufacturers.	1	2	3	4
5. Improve relations with manufacturers.	1	2	3	4
6. Improve merchandise assortment.	1	2	3	4
7. Dispose of slow selling merchandise.	1	2	3	4
8. Improve turnover.	1	2	3	4
9. Select new merchandise lines.	1	2	3	4
10. Benefit from computer use.	1	2	3	4
11. Increase sales per square foot.	1	2	3	4
12. Improve customer loyalty.	1	2	3	4
13. Deal effectively with personnel.	1	2	3	4
14. Increase store traffic.	1	2	3	4
15. Improve store image.	1	2	3	4
16. Improve interior and exterior displays.	1	2	3	4
17. Improve advertising and promotion.	1	2	3	4
18. Other (please specify) _____	1	2	3	4

Please provide the following information:

Mark (x) one or more of the following titles which most nearly describe your position in the store.

_____ a. owner
_____ b. manager
_____ c. buyer
_____ d. salesperson
_____ e. other (please specify)
_____

How long has store been in operation? _____

How long have you been associated with store? _____

Approximate size of store in terms of annual sales volume. Please mark (x).

Annual Sales Volume:

_____ Below $100,000
_____ $100,001 - $300,000
_____ $300,001 - $500,000
_____ $500,001 - $1,000,000
_____ $1,000,001 and over

To make sure you get your FREE 6-month CAMM membership, please leave your address label on booklet and make any necessary corrections.

THANK YOU FOR YOUR HELP!

FOLD HERE AND STAPLE AT THE BOTTOM TO RETURN

Dr. Kathryn M. Greenwood
CENTER FOR APPAREL MARKETING
AND MERCHANDISING
OKLAHOMA STATE UNIVERSITY EXTENSION
306 Home Economics West
Stillwater, Oklahoma 74078

APPENDIX G

WRITTEN COMMENTS ON FUTURE HELP NEEDED BY RETAILERS

Written Comments on Future Help Needed by Retailers

1. "Some manufacturers will not sell to store as they sell instead to competing tall store; makes it difficult to obtain quality goods. Am unsure of my rights with regard to situation and rights of retailers in general vis-a-vis manufacturers/suppliers. (Store age, one year; $100,001-$300,000)

2. "Improve clientele". (Store age, one and one-half years; below $100,000)

3. "...could use more accounting tools, however." (Store age, four and one-half years; Below $100,000)

4. "Interpreting P and L and balance sheets for better store operation; presenting store figures for best impression to banks and factors. (Store age five years; below $100,000)

APPENDIX H

METHODS USED TO REPORT AND ORGANIZE REACTIONS OF RESPONDENTS TO FMCS

Methods used to Report and Organize Reactions of Respondents to FMCS

1. Influence of FMCS on Store Procedures: Retailers indicated the degree (great, some, little, none) they were influenced by FMCS in terms of six retail procedures. A table included data on "great influence" or "some influence" reported by 51 percent or more of the retailers.

2. Professional Help Received from FMCS: Retailers indicated help received from FMCS. A table included data on areas in which 51 percent or more of the retailers reported that help was received from FMCS.

3. Changes in Attitudes about Role as Apparel Retailer: Retailers were asked to respond to ten statements dealing with their role as apparel retailers. A table included data on changes in attitudes about role as apparel retailer as reported by 51 percent or more of the respondents.

4. Plans for Use of Recommended Store Procedures: Retailers were asked to indicate their plans for using concepts discussed by FMCS. Findings from this section were used in recommendations for improvements and expansion of FMCS educational activities.

5. Future Help Needed by Retailers: Retailers were asked to indicate future help needed in retailing. A table included data on areas where great or some help was indicated by 51 percent or more of the retailers.

APPENDIX I

STRENGTHS AND WEAKNESSES IN FMCS WORKSHOPS RELATED TO SIX PROCEDURAL CONCEPTS

TABLE XXXIV

STRENGTHS AND WEAKNESSES IN FMCS WORKSHOPS
RELATED TO SIX PROCEDURAL CONCEPTS

Perpetual Inventory Control

Strengths

After attending FMCS workshops, 70 percent or more of the retailers indicated they:

1. Did use purchase orders[a] to obtain merchandise information for use on price tickets.
2. Did include the following on price tickets: retail price, garment size, style number, date received and manufacturer's code number.
3. Did record the following on purchase orders[a]: merchandise received and merchandise returned to manufacturer.
4. Did record merchandise information to: make decisions about reordering, watch progress of slow/fast sellers and to evaluate manufacturers' performance.

Related Reactions

1. Did have no or only slight difficulty in gathering merchandise information to include on price tickets.

Weaknesses

After attending FMCS workshops, 30 percent or more of the retailers indicated they:

1. Did not include the following on price tickets: color, coded cost (wholesale) price.
2. Did not keep price ticket stubs to record information about merchandise received and sold.
3. Did not record the following on purchase orders: merchandise sold, merchandise marked down, merchandise returned by customer.
4. Did not record merchandise information in order to determine stock shortages.

Related Reactions

1. Did have moderate or serious difficulty in recording information on merchandise marked down.

TABLE XXXIV (Continued)

2. Did have no or only slight difficulty in recording information on merchandise received and sold.

[b]3. Were influenced by FMCS to record information on merchandise received and sold.

[b]4. Had a more positive attitude toward analyzing merchandise records before making buying decisions.

2. Did have moderate or serious difficulty in recording information returned by the customer or merchandise returned to the manufacturer.

Physical Inventory Control

Strengths

After attending FMCS workshops, 70 percent or more of the retailers indicated they:

1. Did use visual control method to identify current stock levels for the following: one-of-a-kind merchandise, merchandise kept in open view and new fashions not stocked in depth.

2. Did use stock counts at regular intervals for the following: staple or basic merchandise and hosiery.

3. Did use stock count information to: make decisions about reordering, watch progress of slow/fast sellers and identify stock shortages.

Weaknesses

After attending FMCS workshops, 30 percent or more of the retailers indicated they:

1. Did not use the percentage of the total inventory for each major merchandise classification.

2. Did not use stock count information to comply with IRS requirements.

TABLE XXXIV (Continued)

Related Reactions	Related Reactions
1. Had no or only slight difficulty in using visual control method. 2. Had no or only slight difficulty in using stock count method. 3. Had no or only slight difficulty in estimating the percentage of major classifications of merchandise. [b]4. Were influenced by FMCS to take stock counts to control inventory for basic stock. [b]5. Had a more positive attitude toward taking stock counts.	None

Manufacturers' Performance

Strengths	Weaknesses
After attending FMCS workshops, 70 percent or more of the retailers indicated they: 1. Used the following information to evaluate manufacturers' performance: sales at full price, markdowns, returns and reorders.	After attending FMCS workshops, 30 percent or more of the retailers indicated they: 1. Did not use the following information to evaluate manufacturers' performance: terms of payment and co-op advertising.
Related Reactions	Related Reactions
1. Had no or only slight difficulty in knowing when to reorder merchandise.	None

TABLE XXXIV (Continued)

2. Had no or only slight difficulty in evaluating manufacturers' performance.
[b]3. Were influenced by FMCS to evaluate the performance of major manufacturers.
[b]4. Had a more positive attitude toward identifying manufacturers with good performance records.
[b]5. Had received help from FMCS to analyze manufacturers' performance.

Dollar Merchandise Plan

Strengths

After attending FMCS workshops, 70 percent or more of the retailers indicated they:

1. Did use the following to estimate planned sales for a specific period: sales volume for same period last year, percentage of sales increase/decrease over last year.
2. Did estimate stock level needed to support planned monthly sales based on stock-to-sales ratio derived from store's figures.
3. Did use the following information to calculate retail dollar amount of merchandise for a given period: planned sales volume and beginning of the month figures.

Weaknesses

After attending FMCS workshops, 30 percent or more of the retailers indicated they:

1. Did not use the following to estimate planned sales for a specific period: promotional events planned and rate of sales increase or decrease by the month.
2. Did not estimate stock levels needed to support monthly sales based on stock-to-sales ratio obtained from national figures.
3. Did not use past records of markdowns to estimate planned markdowns for a given period.

TABLE XXXIV (Continued)

	4. Did not use the following to plan markdown percentages: planned store promotions and planned store clearances. 5. Did not calculate the value of purchases for a given period by considering markdown goals so that stock and sales could be kept in balance.
Related Reactions	Related Reactions
1. Had no or only slight difficulty in maintaining adequate past sales records. 2. Had no or only slight difficulty in estimating the percentage of sales increase or decrease over the previous year's sales volume. b3. Were influenced by FMCS to make seasonal dollar merchandise plans. b4. Had a more positive attitude toward making seasonal dollar merchandise plans.	1. Had moderate or serious difficulty in determining desirable stock-to-sales ratio. 2. Had moderate or serious difficulty in maintaining adequate past markdown records. 3. Had moderate or serious difficulty in establishing markdown policy for merchandise. 4. Had moderate or serious difficulty in keeping stock/sales in balance for a specific period. 5. Had moderate or serious difficulty in estimating consumer demand for merchandise in future seasons.

TABLE XXXIV (Continued)

Open-to-Buy Plan

Strengths	Weaknesses
After attending FMCS workshops, 70 percent or more of the retailers indicated they: 1. Did calculate open-to-buy at cost for the purchase of new merchandise each season. 2. Did use keystone method (doubling) to establish retail prices. 3. Did consider merchandise already purchased for delivery during a specific period before calculating open-to-buy.	None
Related Reactions	**Related Reactions**
1. Had no or only slight difficulty in judging what customer is willing to pay for merchandise. [b]2. Was influenced by FMCS to project seasonal open-to-buy by cost (wholesale). [b]3. Had a more positive attitude toward using projected sales and inventory needs to plan dollar open-to-buy.	1. Had moderate or serious difficulty in planning merchandise delivery dates. 2. Had moderate or serious difficulty in calculating commitments for a given period.

TABLE XXXIV (Continued)

Market Open-to-Buy

Strengths	Weaknesses
After attending FMCS workshops, 70 percent or more of the retailers indicated they:	
1. Did calculate open-to-buy for each major merchandise classification.	None
2. Did allocate open-to-buy based on performance ratings of major manufacturers in each classification of merchandise.	
Related Reactions	
1. Had no or only slight difficulty in making fashion judgments appropriate for store image and target customers.	
2. Had no or only slight difficulty in finding time to visit potential resources at market.	
[b]3. Were influenced by FMCS to distribute open-to-buy among major manufacturers.	
[b]4. Had a more positive attitude toward distributing open-to-buy according to merchandise classification.	

[a]Purchase orders, logs, journals, invoices
[b]Long and short contacts

APPENDIX J

WRITTEN COMMENTS FROM RETAILERS

WRITTEN COMMENTS MADE BY RETAILERS ON ASSESSMENT SURVEY

Positive Comments -- Long Contacts

I was a new store owner when I attended. Your course helped me a great deal. (Store age 2.5 years; $100,001-$300.000)

I had just opened up after my first FMCS seminar last October. Setting up the inventory records helped me the most.

My workshop helped so much that my gross sales have more than doubled. (Store age 8 years; $100,001-$300,000)

I've only attended one workshop--at that time I was so new at fashion. I brought home many good ideas and I'm still using many helps. I've planned to attend again, but circumstances have prevented it. Again, I just wish I were 40 years younger. I love fashion retailing--just got into the business kinda' late. I'm 72 with only three employees so changes are hard to make. (Store age 20 years; associated with store 5.5 years; $100,001-$300,000)

(Meet and interact with other apparel retailers and discuss common problems and opportunities) was the most productive aspect. (Store age 3 years; below $100,000)

I took a workshop for new owners. At the time, I had been in retail for over a year and had already established many procedures--the course was basic yet interesting. (Store age 72 years; associated with store 3 years; $300,001-$500,000)

Gave me confidence to open store with modicum of knowledge lacking prior to FMCS. (Store age 1 year; $100,001-$300,000)

I attended the workshop after owning my store for a year. I wish I had attended before I purchased. I have recommended your workshops to several other retailers. Many of my fellow retailers "fly by the seat of their pants" and lose many dollars. I am convinced and my sales and gross margin increases support the theory that the more organized approach you take, the better off you are! (Store age 10.42 years; associated with store 2.5 years; $100,001- $300,000)

Negative Comments - Long Contacts

I did not use manufacturers' performance procedures--

reason: time and effort was not justified; had more important matters in store. (Store age 18 years; $300,001-$500,000)

Needed more in-depth study on open-to-buy, stock-sales ratio. (Store age 7 years; $100,001-$300,000)

I didn't understand the open-to-buy term.

General Comments - Long Contacts

Still not planning as efficiently as should be. (Store age 12 years; $500,001-$1,000,000)

I need to do more of this (estimate planned sales for a specific period by considering promotional events planned and estimating the percentages of sales increase/decrease last year)... Still much left unanswered for me... This is difficult (projecting sales and inventory needs to plan dollar open-to-buy)... Much to learn. (Store age 2 years; $300,001- $500,000)

Other uniform retailers are not open to discussing problems...With the economic problems of this area, the joy has been taken out of this business. (Store age 6 years; $100,001- $300,000)

Positive Comments - Short Contacts

I was encouraged to continue, since our controls are practically the same...It was a pleasure seeing and working with all of you again. (Store Age 85 years, associated with store 30 years; $1,000,000 and over)

My lack of answers does not indicate indifference or negative feelings; I have only attended one hour long basic course plus a couple of short personal sessions with a counselor in the buyers lounge at Dallas. I am very pleased that these courses and services are offered and I plan to attend others. Hopefully Kansas City will enlarge their offerings of these courses also. (Store age 5 years; below $100,000)

General Comments - Short Contacts

I simply did not take advantage of FMCS, but I am planning to. (Store age 10 months; $100,001-$300,000)

Please note: I was only able to attend part of one of the free sessions--I would like to attend another. I run the store by myself, with one part-time salesperson, so I can keep close track of stock in most instances. Could use more accounting tools, however. (Store age 4.5 years; below $100,000)

APPENDIX K

STRATEGIES TO MODIFY PROCEDURES

Selected Stategies to Improve Procedural Concepts Discussed During FMCS Workshops and Classified into the Modify Category

1. Stress the importance of split price tickets which provide stubs to use in manually recording information about merchandise received and sold.

   Stress the need to use split price tickets by allocating more time during the formal workshop presentation; develop a list of advantages to using split price tickets and insert the list in the FMCS workbooks used during the workshops. Include samples of a variety of split price tickets at each table for the retailers to see.

2. Discuss in more detail the importance of evaluating manufacturers' performance by checking terms of payment and manufacturers' policy on co-op advertising.

   Define and explain payment terms offered by manufacturers by preparing a one-page sheet of terms currently in general use; place the information sheet on typical terms of payment offered to retailers in FMCS workbooks and spend some time going over the terms during the workshop. Also, define and explain co-op advertising during the workshop since retailers might not be aware of the concept of sharing advertising expenses with manufacturers.

3. Indicate more strongly the need to maintain adequate past markdown records to plan markdown percentages based on planned store promotions and planned store clearances and to establish markdown policy for merchandise.

Prepare a mini-booklet on ways to efficiently and effectively organize past markdown records including information on possible ways to establish markdown policy for merchandise. Indicate a step-by-step procedure for retailers to follow in organizing and maintaining markdown records including the advantages of using markdown records to plan store promotions and store clearances; include examples of suggested forms to use in recording markdowns.

4. Emphasize strategies in planning merchandise delivery dates.

Prepare an example of a calendar format designed to keep the retailer informed on delivery dates of major mechandise classifications by seasons. Include time for Retail Apparel Guide at each table to initiate a brainstorming session on ways to improve scheduling delivery dates including possible contingency plans for dealing with "no-show" merchandise.

APPENDIX L

CHARACTERISTICS OF ADULTS AS LEARNERS

Characteristics of Adults as Learners

1. Adult learners are goal-oriented learners. The concept of "teachable moment" and "readiness to learn" have direct implications for adult learners. Learning for adults must be a purposeful, practical and applicable activity.

2. The ability of adults to learn does not decrease with age; the power of learning for adults increases with age; the rate (speed) of learning for adults decreases as adults get older.

3. Adults are important resources in learning situations because of their accumulated knowledge and experiences; they have much to contribute in any given instructional/learning process; they can learn much from experienced peers.

4. Adults are motivated to seek new learning experiences for a variety of reasons, both personal and professional. The needs of adult learners change with the roles they are playing--worker, mate, parent, etc.

5. The physical and psychological climate affects the success of adults as learners and increases their motivation to learn.

Reference: Knowles, M. S. The Modern Practice of Adult Education: From Pedagogy to Andragogy. Chicago: Follett Publishing Company, 1980.

APPENDIX M

OBSERVATIONS OF RETAILERS ATTENDING FMCS WORKSHOPS

Observations of Retailers Attending FMCS Workshops

1. Most participants of the workshops did not know each other; only a few retailers came from the same store/shop.

2. Interaction among retailers before the start of the workshop seemed minimal and usually confined to interaction with those retailers sharing the same table.

3. Participants seemed interested in learning how other retailers from similar stores handled specific store responsibilities.

4. Some participants verbalized problems in using calculators, workbooks and in following the FMCS educators during the day-long workshops.

5. The amount of formal presentation time spent for concepts seemed too short for some retailers but too long for other retailers; some participants seemed to experience confusion with certain concepts while other participants were familiar with concepts and seemed anxious to progress to the next concept.

6. Most retailers seemed very receptive to advice received from FMCS educators during the formal workshop presentation; the retailers especially seemed to appreciate the suggestions received from the Retail Apparel Guides sitting at each of the tables and acting as leaders of informal discussions on problems and concerns of apparel retailers.

7. Participants of the workshops representated retailers with extensive retailing experiences and responsibilities to retailers with no or limited exposure to the retailing world.

8. Some retailers indicated a need for additional contact and exchange of ideas with FMCS educators and with other retailers from similar type stores.

APPENDIX N

CLASSIFICATION OF RESPONDENTS AND NON-RESPONDENTS TO ASSESSMENT SURVEY

TABLE XXXV

CLASSIFICATION OF RESPONDENTS AND NON-RESPONDENTS TO ASSESSMENT SURVEY

Educational Activity and Year	Mail Contacts			Phone Contacts	
	Mailed	Returned by Retailer	Returned by Post Office	No Business Phone	Participant No longer at Store
Long Contacts					
Workshops					
1979	48	10	2	14	4
1980	57	24	0	17	6
1981	51	17	1	8	2
Totals	156	51	3	39	12
Short Contacts					
Consultation Sessions					
1980	30	0	2	*	*
1981	180	15**	4	*	*
Seminars					
1981	94	12***	1	*	*
Totals	304	27	7		
Overall Totals	560	78	10	39	12

* No attempt was made to contact by phone.
** Five respondents indicated they did not attend FMCS educational activity.
*** One respondent indicated she did not attend FMCS educational actitity.

APPENDIX O

ACTIVITIES TO IMPROVE CLIMATE FOR LEARNING FOR PARTICIPANTS OF FMCS WORKSHOPS

Activities to Improve Climate for Learning for Retailers attending FMCS Workshops

Get Acquainted Activity

1. "Getting to Know You" information sheets are filled out by each retailer at the registration table in the hall. Each participant places the information sheet into a long envelope. Name tags are given to all participants and a table is then assigned to each participant.

2. The FMCS director welcomes the participants and gives instructions to put all envelopes containing the "Getting to Know You" forms in the center of each table. The Apparel Retail Guide at each table introduces the retailers to the other participants sitting at the table. The Guide then picks up each envelope and rearranges them; each participant is given one envelope and asked to open.

3. The Retail Apparel Guide calls on each retail by name to share the information on the "Getting to Know You" form.

4. After all the information sheets have been read, the retailers introduce themselves in this manner. "I am the retailer who has just open a new shop in my home town of 25,000 after having lived in New York for 20 years". "I must confess, I am the seasoned retailer who is concerned about increasing efficiency in my store that I have owned and managed for 10 years".

5. The Guides at each table briefly indicate their professional background and their interest in working with FMCS participants. They then take the lead in order to organize each of the round table discussions around interests of the retailers at their tables. The informal round table discussions take place before each of the two 15 minute recesses in the formal workshop presentations.

One example of a "Getting to Know You" information form is on the next page.

GETTING TO KNOW YOU

The members of the FMCS staff want to personally welcome you to their day-long workshop. We hope you enjoy the day and go back to your stores will information you can use.

Since you will be spending much of the time during the day at assigned tables, we want you to get to know the other retailers as well as the Retail Apparel Guide assigned to your table. If you have any problems in seeing the screen or hearing us or if the room temperature needs to be checked, please tell your Retail Apparel Guide assigned to your table.

Briefly describe the type of store where you work (age, size, type of merchandise carried, etc).

Briefly indicate responsibilities in which you receive satisfaction in doing and in which you feel that you do a good job.

Indicate a few areas in which you feel weak in and could use some professional help or suggestions.

How many years of experiences have you had in apparel retailing? _____ What techniques or procedures related to your responsibilities as an apparel retailer would you like to share with the other members of your group? We know that each one of you has something to offer other retailers; something that you are proud of or excel in. We want to hear from you!

VITA 2

Maureen Webb Brooks

Candidate for the Degree of

Doctor of Philosophy

Thesis: ASSESSMENT OF AN ONGOING UNIVERSITY EXTENSION PROGRAM FOR RETAILERS IN THE DALLAS APPAREL MARKET

Major Field: Home Economics--Clothing, Textiles and Merchandising

Biographical Data:

Personal Data: Born in Houston Texas, October 21, the daughter of Mr. and Mrs. Clyde L. Webb

Education: Graduated from Our Lady of Victory, Fort Worth, Texas, in May, 1958; received the Bachelor of Science degree in Merchandising from Texas Woman's University, Denton, Texas, in 1962; received the Master of Science degree in Clothing, Textiles and Merchandising from Oklahoma State University in 1965; enrolled in doctoral program at Oklahoma State University in 1981; completed requirements for the Doctor of Philosophy degree at Oklahoma State University in December 1983.

Professional Experience: Instructor at Delta State University, Division of Home Economics, Cleveland, Mississippi, 1965-1970; Assistant Professor, 1970-1983; sabbatical leave from Delta State to enroll in graduate study at Oklahoma State University, 1981-1982.

Professional Organizations: Member of American Home Economics Association, Mississipi Home Economics Association, Association of College Professors of Textiles and Clothing, American Collegiate Retailin Association, Kappa Omicron Phi.